



Capital
Markets
Day

May 26, 2026

Kempower 2.0: Scaling a global leader in DC fast charging

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Capital Markets Day

May 26, 2026



Scaling a global leader in DC fast charging

Bhasker Kaushal
Chief Executive Officer



Digitally enabled aftermarket

Katri Piirtola
Chief Aftermarket Officer



Technology and product leadership creating customer value

Jussi Vanhanen
Chief Product Officer

Monil Malhotra

President, North America & Digital Solutions Leader



Winning with customers – Accelerated share gain and expansion in Europe and Asia-Pacific

Mathias Wiklund
Chief Sales Officer



Operational excellence – our competitive edge

Sanna Otava
Chief Operating Officer



Geographic expansion – our North America success story

Monil Malhotra
President, North America & Digital Solutions Leader



Delivering sustained profitable growth

Jukka Kainulainen
Chief Financial Officer

Q&A

Break – 15 minutes

Q&A and closing words



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Kempower 2.0: Scaling a global leader in DC fast charging

Bhasker Kaushal
Chief Executive Officer

Mission and Vision: Why we exist, and where we're going

Mission





**Accelerating the electric
mobility transition**

Vision

**A top 3 global leader in DC
fast charging - trusted by
customers, built to compound**

Executive summary:

Kempower 2.0: Proven leader. Scaling platform. Built to compound

 <p>Attractive, fast-growing market</p> <ul style="list-style-type: none"> ✓ Sustained growth in addressable market driven by growing EV adoption across regions and segments 	 <p>Proven leadership position</p> <ul style="list-style-type: none"> ✓ Leader in distributed architecture, with industry's strongest combination of hardware, services and software 	 <p>Expanding to full lifecycle solutions</p> <ul style="list-style-type: none"> ✓ Evolving from one-time hardware sales to full lifecycle offering with recurring aftermarket revenues 	 <p>Sustained profitable growth</p> <ul style="list-style-type: none"> ✓ Target above-market revenue growth and profitability through market cycles
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€4.5B → €10+B

Total addressable market, 2025 → 2030

Top 3

Global position ambition¹, by 2030

15-25%

Revenue CAGR target, 2025-2030

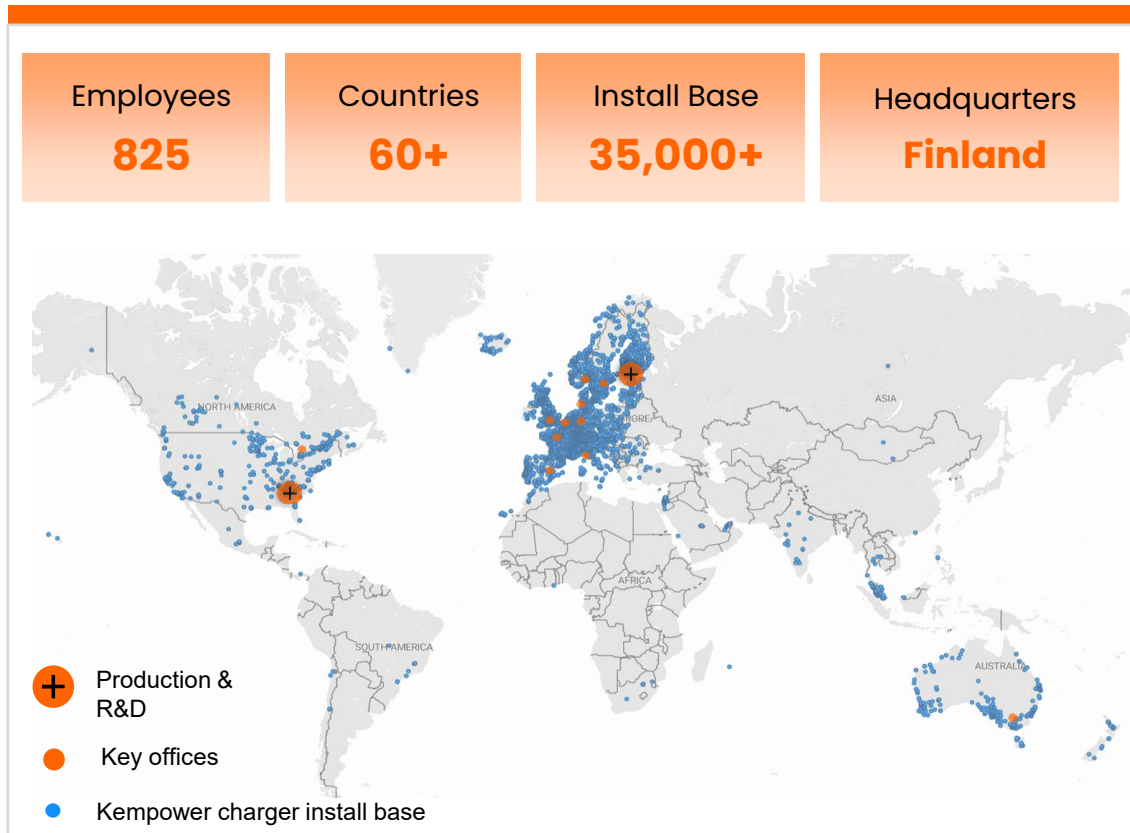
10-15%

EBIT margin target, by 2030

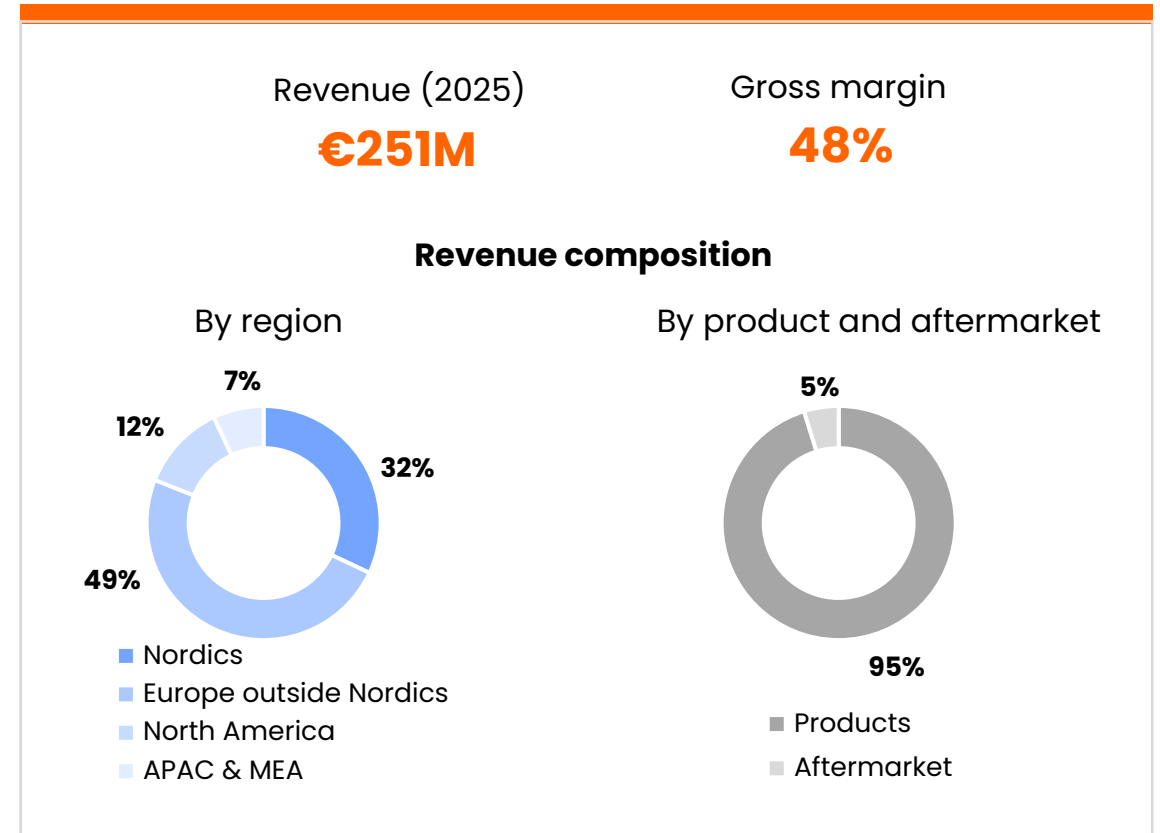
1) Ambition in our addressable markets

Kempower overview: A pioneer and leader in DC fast charging

About Kempower



2025 Financials



**Recognized as one of the fastest growing companies in Europe:
#2 in Finland and #3 in Electrical Manufacturing in Europe by FT1000**

Kempower is focused on DC fast charging: Powering e-mobility across segments

DC CHARGING

>50 kW

< 30 min charging time*

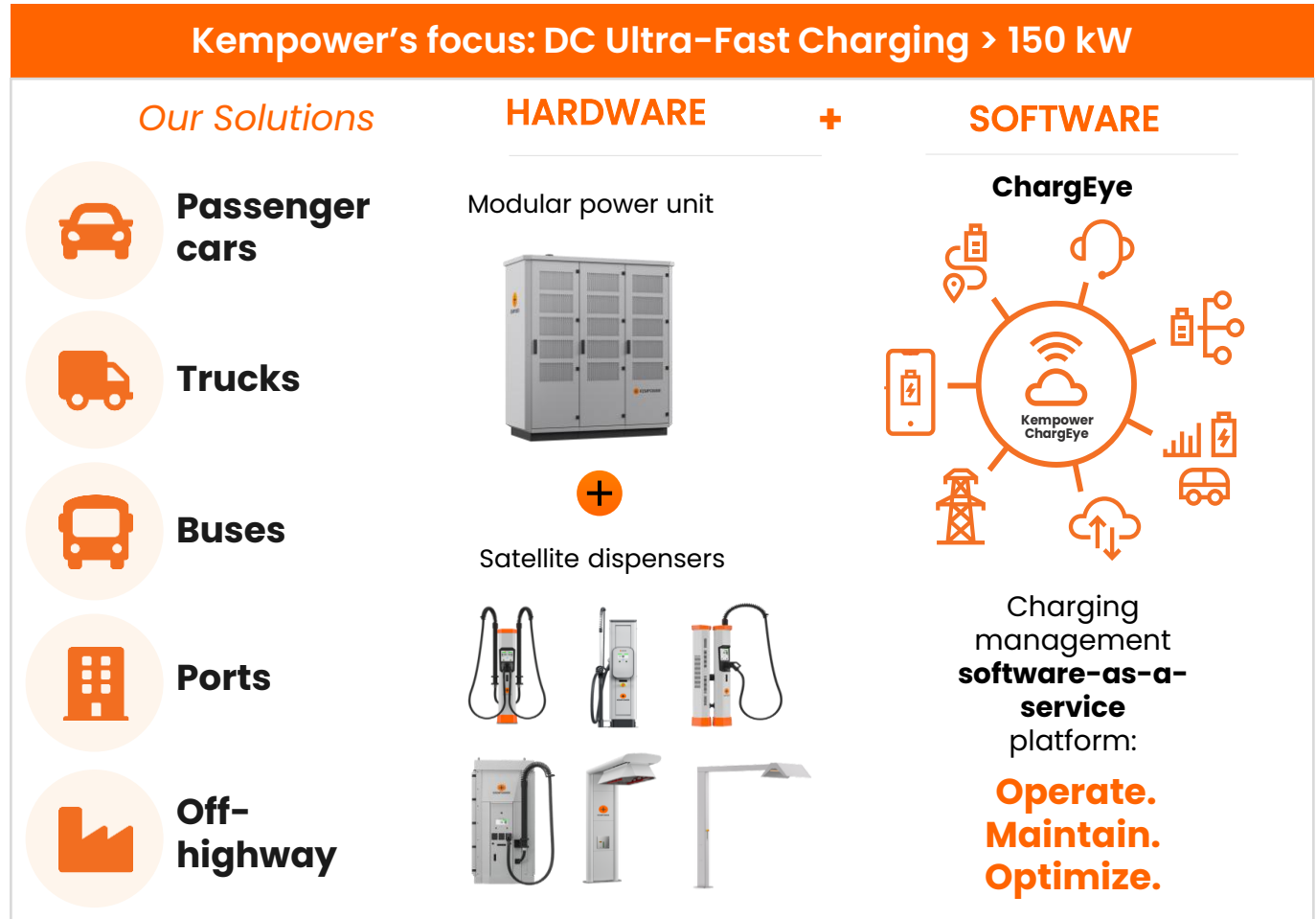
Differentiated technology. Higher margins. Higher growth by value.

AC CHARGING

<22 kW

8+ hours charging time

Commodity technology. Lower margins. Lower value.

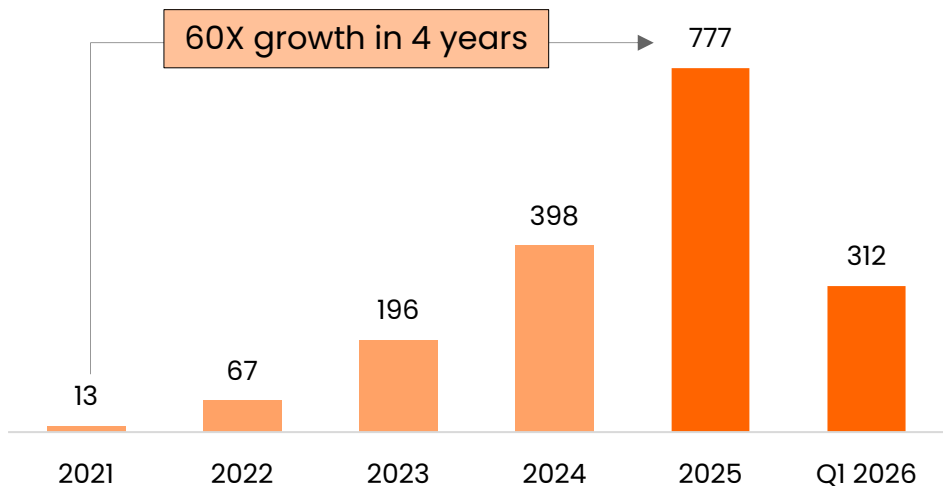


* Charging battery from 10% -> 80% charge

ESG leadership: Delivering environmental impact at scale, with trusted infrastructure for the energy transition

Environmental impact at scale

Energy delivered through Kempower chargers (million kWh)



1.7B kWh total energy delivered through Kempower chargers

1.4M tonnes CO₂ avoided YTD 2026

Validated by leading independent rating and standards bodies

GOLD **ECOVADIS**
Top 5% globally

Independent rating across environmental, labor, ethics and procurement

GREEN **NASDAQ**
Green Equity Designation

Revenues aligned with the green transition. Committed to UNDP targets

TRUSTED **CYBERSECURITY**
ISO 27001 - Trusted critical infrastructure

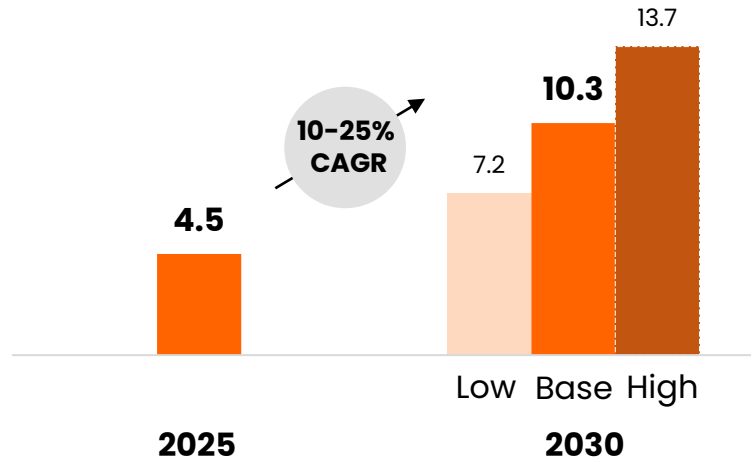
Certified to European information security standards - increasing requirement for customers

DC fast charging: A €4.5B market growing to €10B+

Europe, North America & Asia-Pacific (excl. China), 10-25% CAGR depending on market scenario

Total Addressable Market (TAM), 2025 → 2030

Annual DC fast charging market size in EUR Billion, Europe, North America & Asia (excl. China)



Based on different EV adoption and charging market scenarios

10%
Low CAGR

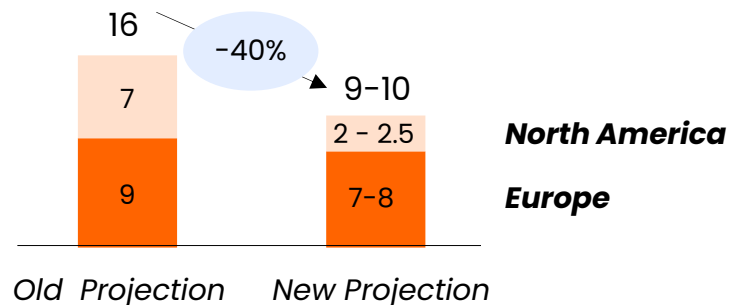
18%
Base CAGR

25%
High CAGR

BEV transition continues at a more realistic pace – still, set to roughly triple by 2030

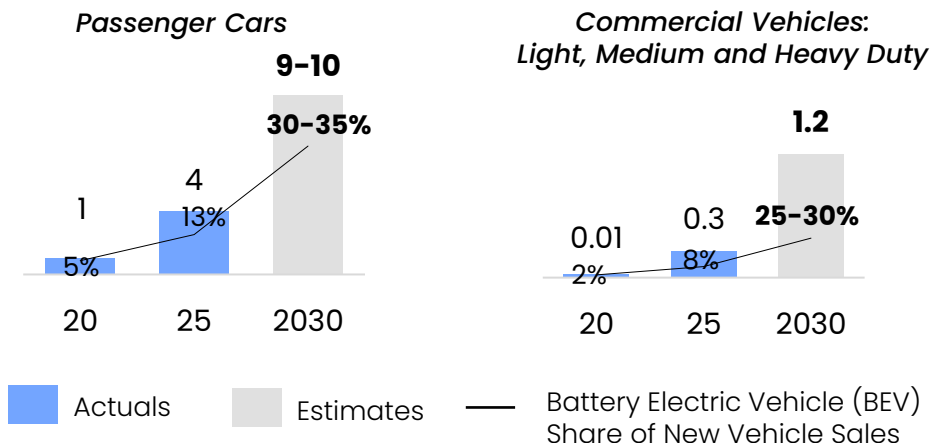
Battery electric vehicle: Growth normalized vs. old estimates

2030 New BEV registrations forecasts: Passenger cars Europe and North America (million units)



Battery electric vehicle growth 2025 → 2030

New BEV registrations forecasts Europe and North America (million units)



BEV market growth reset over the last two years was real

BEV market still set to roughly triple by 2030
Total BEV registrations (**4M → 11M**) and BEV share (**12% → ~30%**) with Europe leading and North America following

The market normalization reset our targets, not our ambition

Secular tailwinds support sustained market growth and long-term opportunity

€ TCO advantage

BEV vs ICE economics

BEV TCO already lower than ICE for most use cases

Regulatory & emissions targets

Europe CO₂ emissions targets (grams per km)

Tightening CO₂ rules driving OEMs to electrify – timeline is regulatory, not optional

Public and private funding

Public funding B€

NEVI	5
E-Truck Charging	1.6
Zero Emissions Truck & Van	1.2
AFIR Initiative	1

Private funding (anonymized CPO examples)

Leading US CPO	Leading EU CPO	Large EU CPO
\$1B+	€400M	€500M+

€10B+ announced over last 2 years

Sustained public and private investment funding charging infrastructure build out

Energy security is a strategic imperative

Crude oil price

Oil price and geopolitical volatility is accelerating govt. and corporate electrification commitments

Sources: IEA, EU Commission, EEA, 2025; EU 2026/1046, BEUC, US NEVI, Reuters, company announcements

*Figures based on publicly available sources and are illustrative. Statements regarding future market trends are forward-looking and not a forecast or guarantee of future performance. Third-party names and marks are property of their respective owners.

Market position: Top 5 global player, leader in distributed architecture

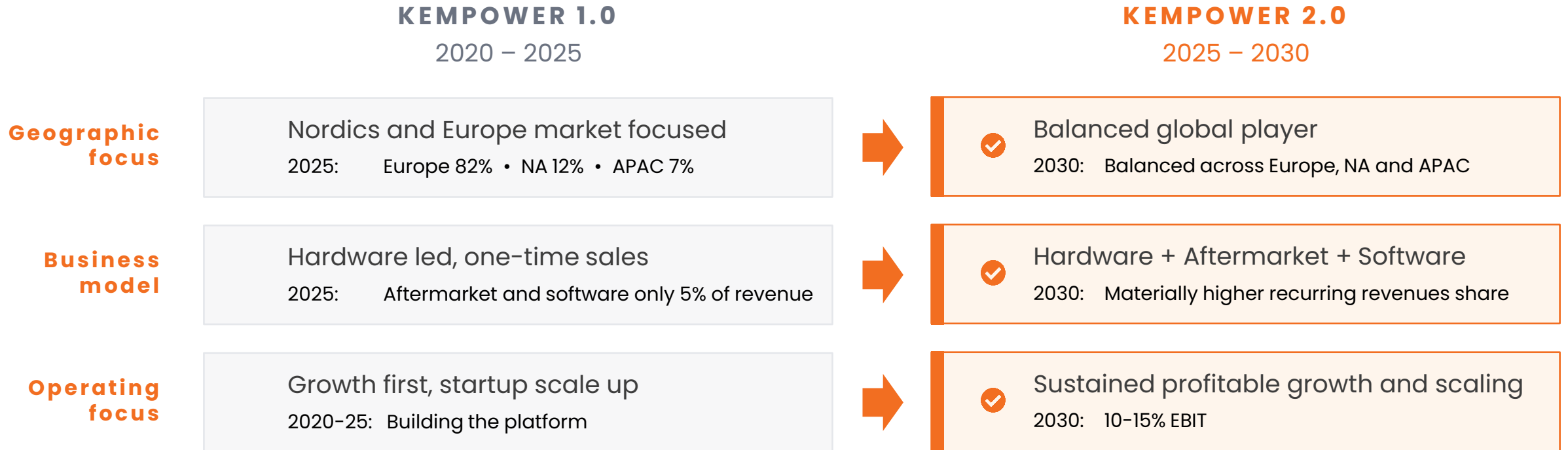
DC fast charging manufacturer Company	Ownership & HQ		DC Fast Charging Installed Base ¹ ('000 units)	Product Offering Strength ²			
				Hardware		Aftermarket	
				All-In-One	Distributed	Software	Services
European peer A	Private		100–120	●●●●	●●●●	●●●●	●●●●
European peer B	Public		60–80	●●●●	●●●●	●●●●	●●●●
Global peer C ³	Public		40–50	●●●●	●●●●	●●●●	●●●●
Kempower	Public		35+	●●●●	●●●●	●●●●	●●●●
Asian peer D	Public		20–30	●●●●	●●●●	●●●●	●●●●
Asian peer E	Public		20–25	●●●●	●●●●	●●●●	●●●●
Global peer F	Private		20–25	●●●●	●●●●	●●●●	●●●●

Where Kempower Wins:
The strongest hardware–lifecycle services–software combination among the top DC fast–charging players

Distributed hardware	Software (ChargEye)	Lifecycle services
Leader with unique modular/satellite architecture	3-tiered SaaS platform	Scaling services & aftermarket in 60+ countries

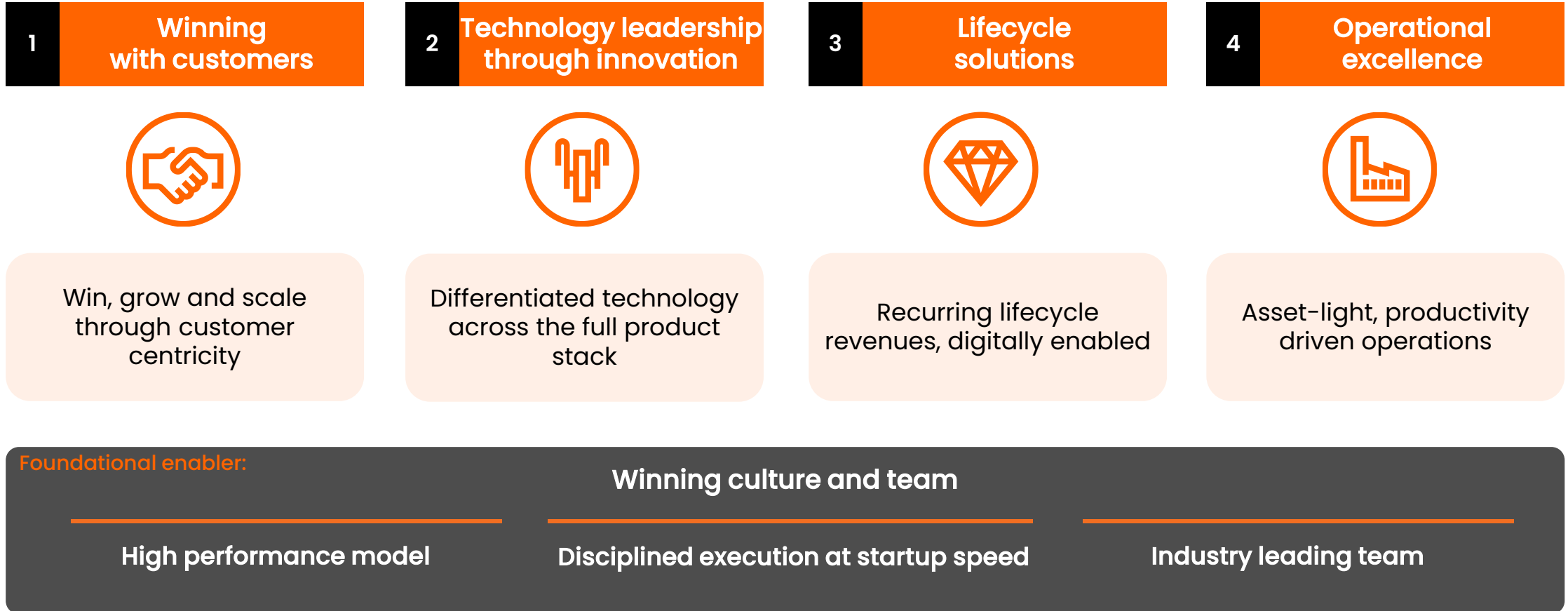
1) Installed base of Charging Points or Chargers* (different naming used by players). Source: Installed-base figures from company disclosures, where available and approximate estimates based on industry intelligence where not disclosed;
 2) Product-offering assessment reflects Kempower's good-faith management view based on publicly available product information and third-party rankings. Presented for illustrative purposes only, not a substitute for independent assessment and not investment advice. Trademarks belong to their respective owners.
 3) Company website reports 80K chargers including DC and AC, assumed directional 50-50 split which may not be accurate

Kempower 2.0: Same mission, evolved playbook with 3 key areas of evolution



Evolving from regional, hardware focused to global lifecycle leader. Sustained profitable growth focused

How we win: Four strategic pillars to become the top 3 global leader



1 **Winning with customers:** Trusted by leading operators across segments and regions

Charge Point Operators: Car public charging



Circle K, Stockholm, Sweden



Revel, NY, USA

Fleet | Truck



EV Realty, San Bernadino, USA



ASKO, Oslo, Norway

Fleet | Bus



Thomas Bus, NC, USA



Alsa, Ibiza, Spain

Ports



DP World, London, UK



Meridian Port Services, Ghana

A diversified blue-chip customer base across CPOs, fleets and ports validates market position and reduces concentration risk

350+
customers globally

135+
new customers added
in last 2 years

50%
of revenues from
top 25 customers

75% / 25%
Car public charging vs.
fleet installed base

1 **Customer centricity:** Different buyers, different value drivers – same Kempower platform

PASSENGER CAR PUBLIC CHARGING

Buyer: Charging Point Operators (CPOs)

**75% of our
installed base**

Buyer's economic driver: revenue per site per day

✓ **Distributed architecture for high-throughput sites**

Multiple vehicles charge in parallel without throttling – CPOs maximize utilization and revenue per site

✓ **Best-in-class uptime and reliability**

Modular satellite design isolates failures, protecting CPO revenue and brand vs. site-wide outages

✓ **Scalable site economics**

Sites grow with demand without rip-and-replace – CPOs deploy capital incrementally as utilization builds

COMMERCIAL VEHICLE FLEETS

Buyer: Truck, bus, port and off-highway fleet operators

**25% of our
installed base**

Buyer's economic driver: total cost of ownership over fleet life

✓ **Distributed architecture for depot economics**

Power scales independently of dispensers – efficient for depots where vehicle count grows over time

✓ **Megawatt-ready for long-haul and heavy-duty**

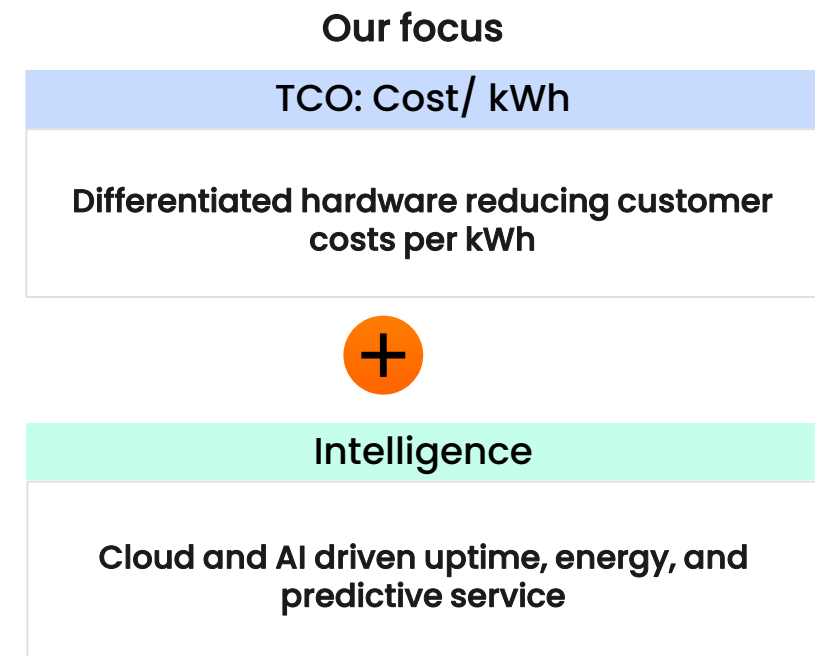
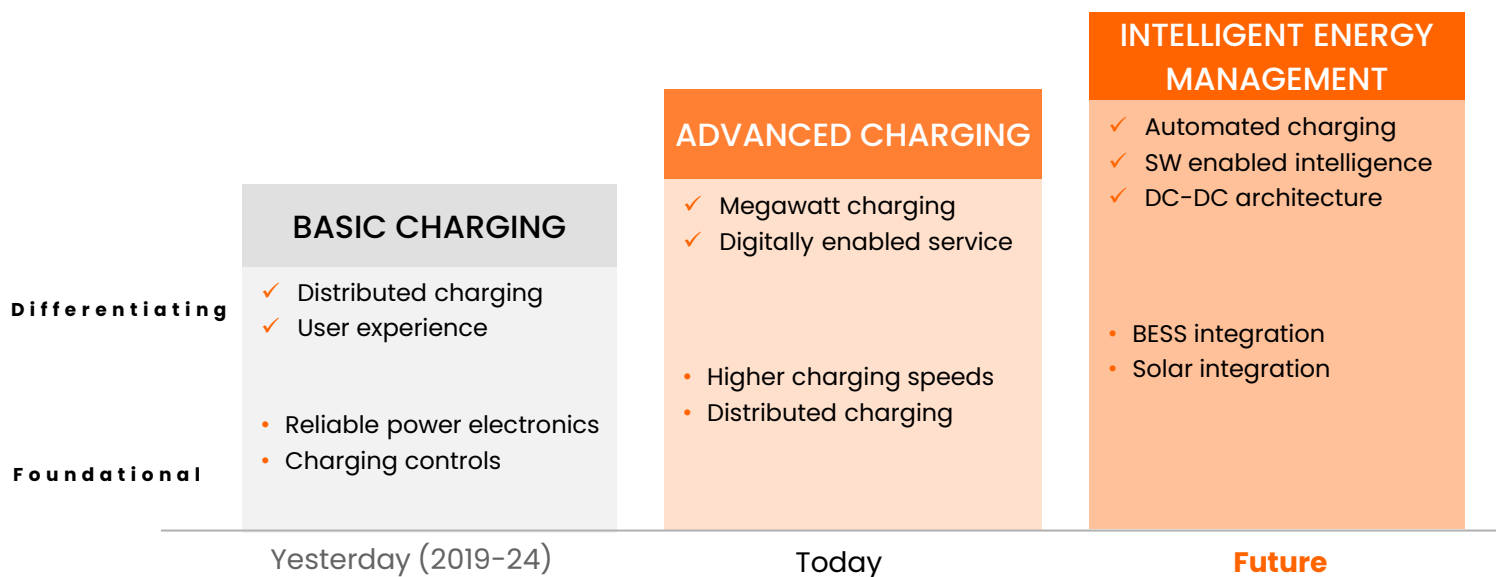
Leader in Megawatt charging system (MCS) – strong growth potential in truck and port segments as megawatt charging rolls out

✓ **Fleet-grade reliability and integration**

SLA-driven uptime, fleet management system integration, maintenance software, meeting key requirements of fleets

2 Technology leadership through innovation: Differentiation is shifting from kW to TCO and intelligence

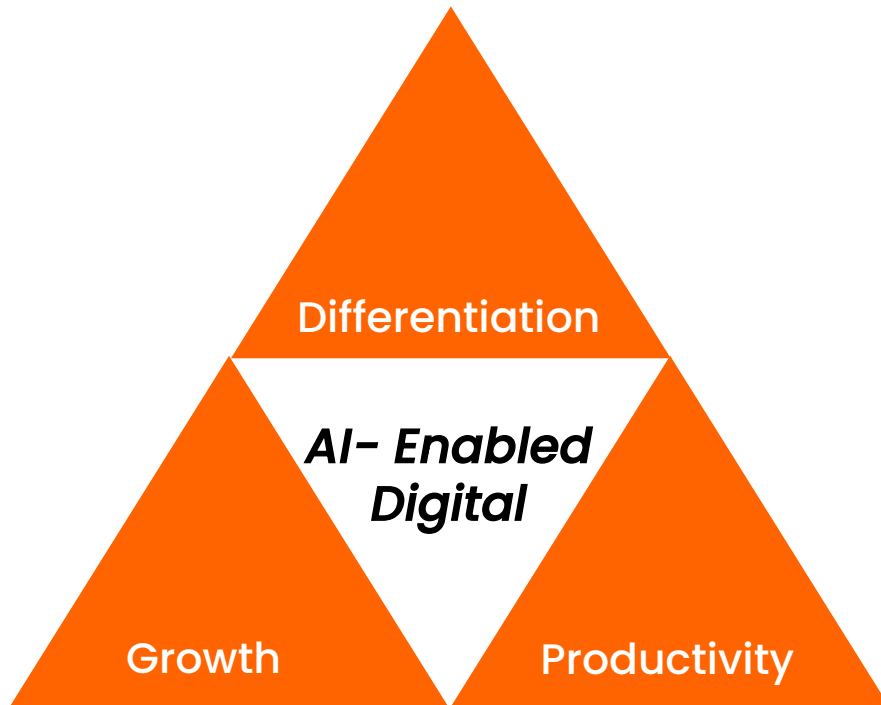
Technology differentiation evolution



Kempower Positioned to Win With

- Above-market R&D investment**
 - R&D FTEs **25%** of total workforce
- Unique patented IP**
 - Power supply IP – **PATENTED**
 - Cable support mechanisms IP – **PATENTED**
 - Dynamic-charging algorithms
- University partnerships**
 - LUT University (Finland)
 - FREEDM Systems Center – NC State University (US)

2 AI-enabled digital capabilities: Drive growth, differentiation, and productivity



Differentiation

- ✓ AI-based features & functionality
- ✓ Differentiates against competitors



Growth

- ✓ Revenue expansion via ChargEye platform
- ✓ Trackable subscription / SaaS revenue
- ✓ Installed base monetization

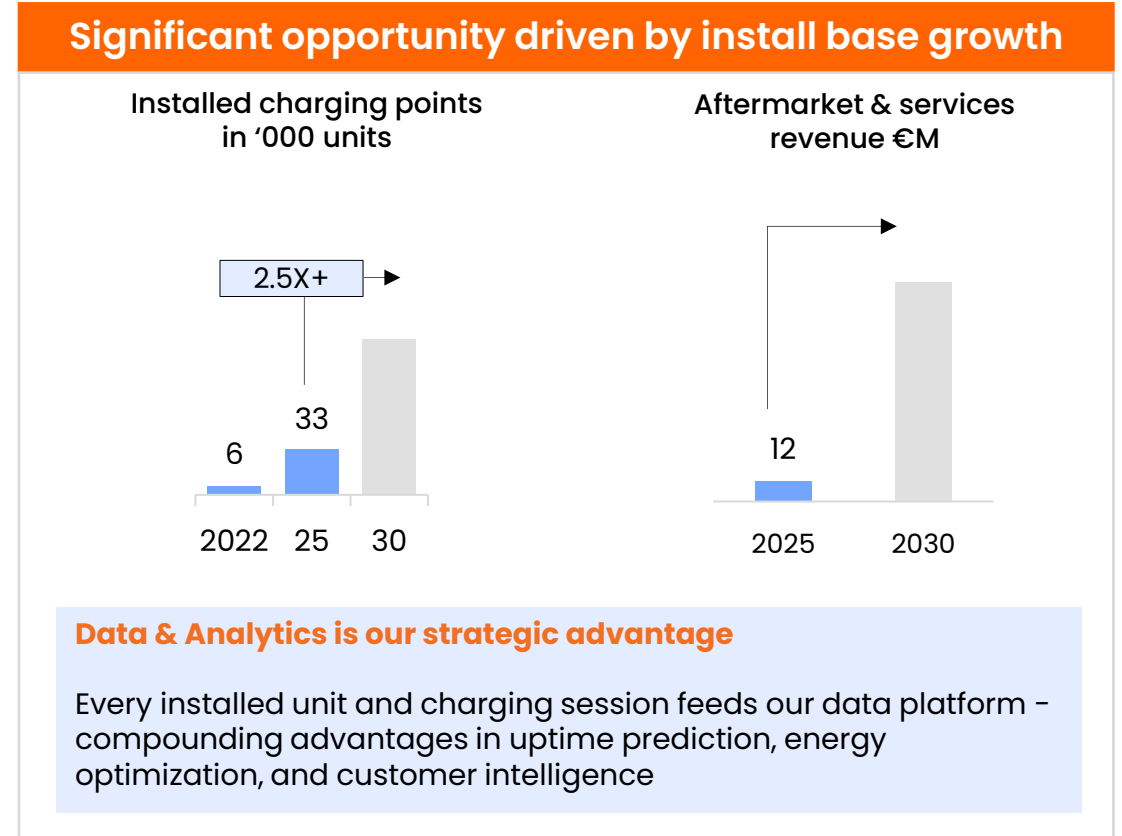
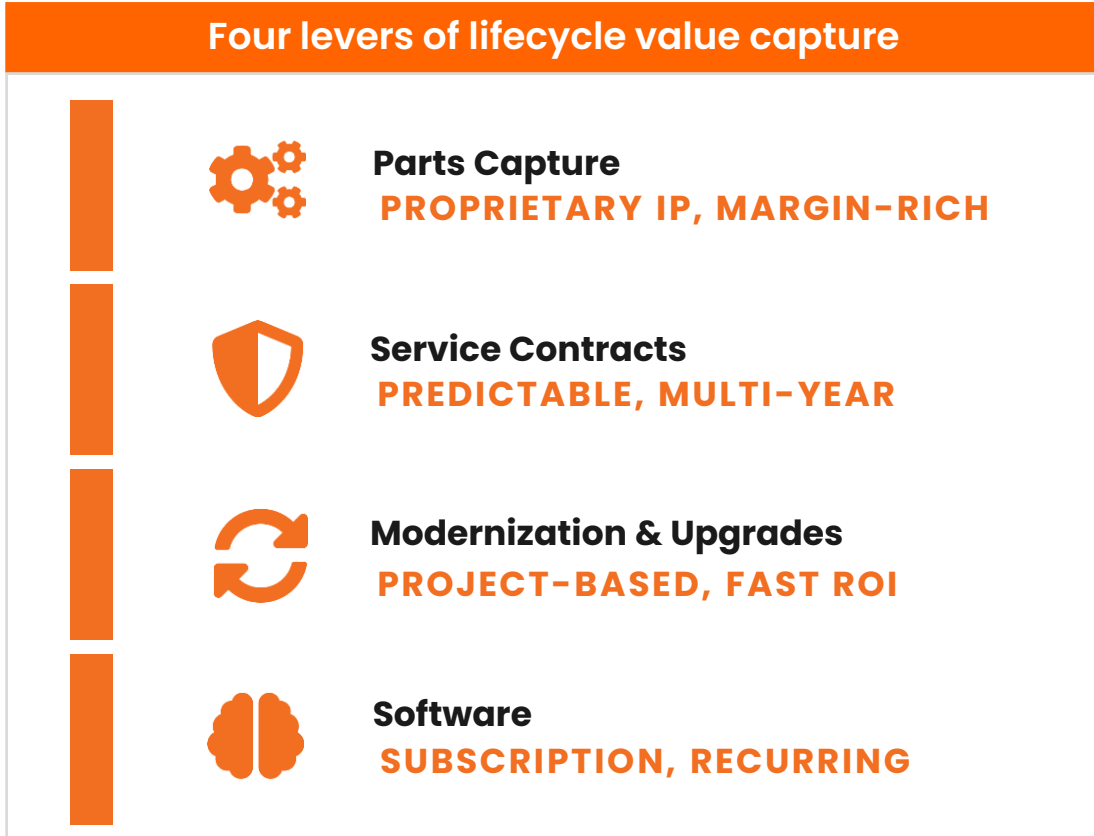


Productivity

- ✓ Apply AI to everyday tasks to improve work efficiency
- ✓ 20+ AI agents being deployed at scale
- ✓ E.g. 8 hrs/week saved per FTE in software dev. and 20% productivity improvement in order handling

AI-enabled digital capabilities already driving meaningful impact in 2026

3 Lifecycle solutions: Building and scaling a recurring revenue business



Aftermarket & software shift to materially higher share of revenue - higher margin, better predictability with recurring base

4 **Operational excellence: Scalable, efficient, capital-light by design**

Delivery and quality excellence



Differentiated, leading performance

- ✓ Order-to-delivery (>98%)
- ✓ Lead time 6 weeks
- ✓ Configure-to-order flexibility

Scalable model



3X growth ready

Factory capacity and equipment without major capex; labor scales with volume

Productivity driven



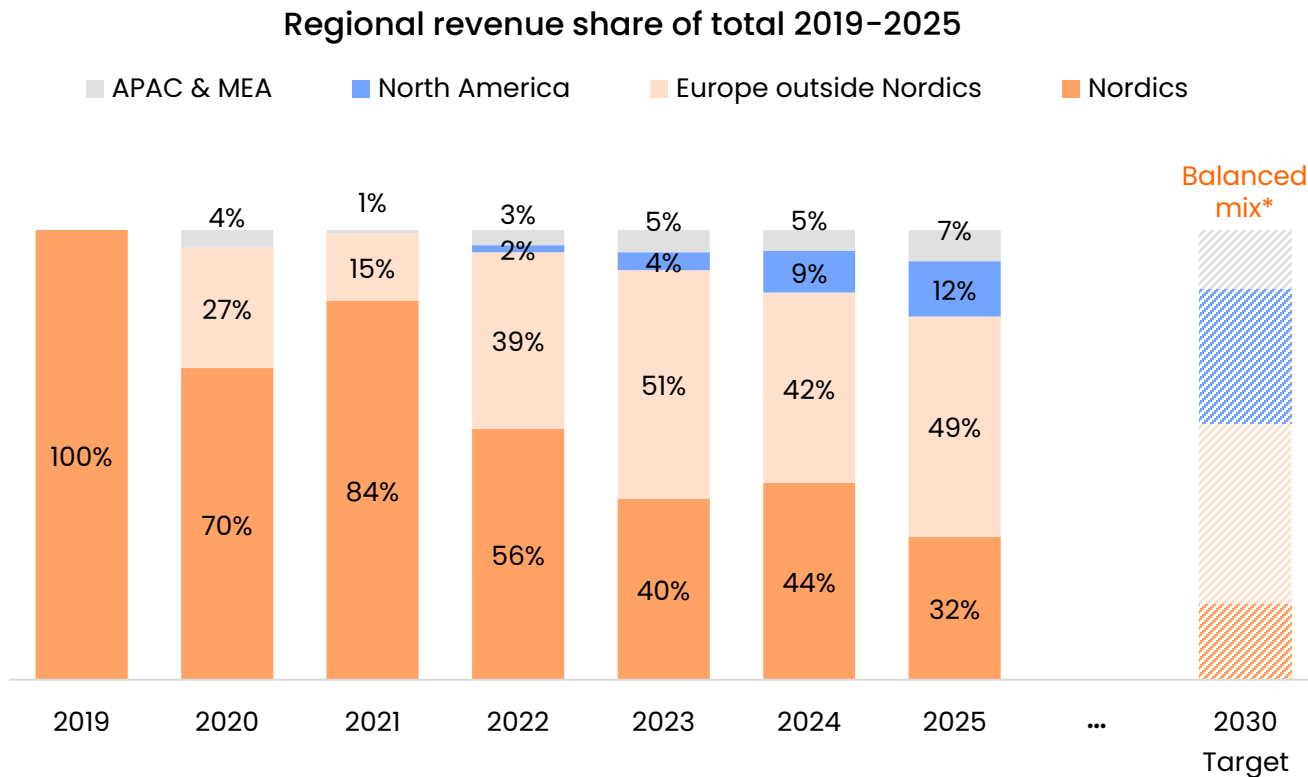
€10m+ productivity in 2026, 7% annual target

Direct unit cost improvement; target opex grows < half the rate of revenue growth

Ample capacity headroom to scale and productivity focus without compromising quality

Building a diversified global revenue base with discipline: Positioned to capture every regional growth wave

Revenue diversifying from Nordics dominance to balanced global mix



Our growth ambition

- 1 NORDICS** DEFEND SHARE
 Protect and deepen #1 position
- 2 REST OF EUROPE** GAIN SHARE
 Scale to top 2-3 across UK, DACH, Benelux, South Europe, and Eastern Europe
- 3 NORTH AMERICA** GAIN SHARE
 Scale to top 3 position with marquee CPO and fleet wins
- 4 Asia-Pacific** SCALE SELECTIVELY
 Targeted entry and scaling in priority markets with local partners

2030 ambition: balanced mix across four regions

* Illustrative mix

Kempower 2.0 value creation framework: Disciplined, profitable, compounding growth

Our formula to deliver compounding value

I Disciplined above-market growth in hardware

- Share gain, margin-protected growth
- Balanced global expansion



II Lifecycle revenue expansion

- Shift to materially higher services & aftermarket share of revenue
- Higher margin, higher predictability



III Operating profit expansion

- Operating leverage
- Aftermarket mix
- Productivity



IV Disciplined, selective reinvestment

- Target Opex growth at less than half the rate of revenue growth
- Invest in priority areas: Technology, services, sales

Updated financial targets: We target sustained profitable growth

**FINANCIAL TARGETS
CAPITAL MARKETS DAY 2026**

<p>REVENUE GROWTH</p> <p>15-25%</p> <p>CAGR by 2030</p>	<p>OPERATIVE EBIT</p> <p>10-15%</p> <p>Target by 2030</p>	<p>DIVIDENDS</p> <p>No dividends in the short term</p>
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How the range works across market scenarios

	Slow market	Base market	Accelerated
Market state			
Kempower revenue growth	Lower end of target range	Mid-point of target range	Upper end of target range
Reinvestment	Tighter	Balanced	Lean-in
Operative EBIT expansion	Sustained profitable growth		

Winning culture

Two foundational enablers that turn strategy into results

High performance model

Role clarity and accountability

Clear ownership of KPIs at every level, leaders empowered to deliver outcomes

Developing and empowering talent

Invest in our people; give them the tools, coaching and stretch to grow

Performance bar raised

Continuously raising the bar for individuals, teams and the company

Disciplined execution culture at startup speed

Capital allocation discipline

Investments tied to strategic priorities; opex growth calibrated to revenue growth

KPI-driven operating model

Dashboard, KPI- and target-driven; every team and leader measurable

Startup speed preserved

Bias for action, fast decisions, pace as we scale

Operationalized through KPI scorecards

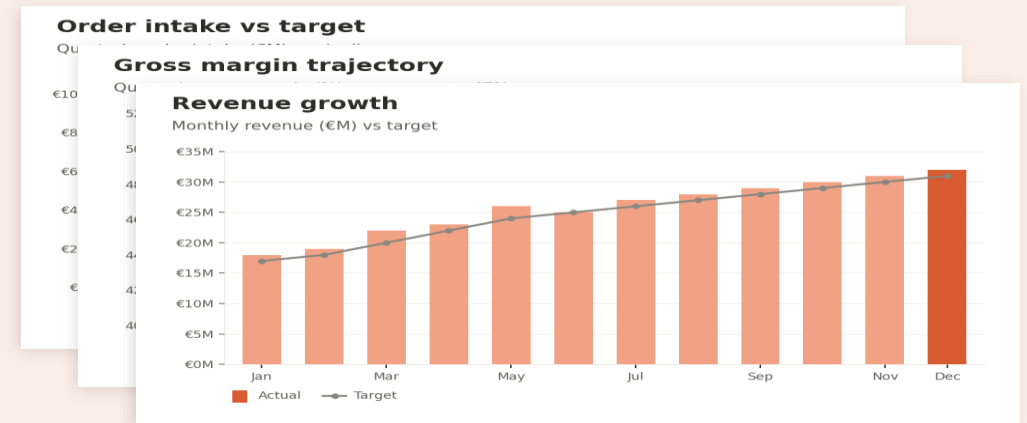
Standardized dashboards for management reporting that drive:

Accountability *Every team owns KPIs, every leader is measurable*

Transparency *Same data, top to bottom, no surprises*

Speed *Faster issue → action loop, faster decisions*

Illustrative scorecard view



Winning, industry-leading team



The team behind it:

800+

Owners of outcomes
across the company

60+

Nationalities
across three continents

25+ yrs

Industry experience
average across executive
team

40%

Female representation
in leadership

Global Leadership Team



Bhasker Kaushal
CEO

*Joined 2025
Ex-Carrier*



Jukka Kainulainen
CFO

*Joined 2021
Ex-Cap Gemini*



Sanna Otava
COO & interim CTO

*Joined 2019
Ex-Kemppi*



Mathias Wiklund
Chief Sales Officer

*Joined 2024
Ex-Universal Robots*



Monil Malhotra
**President, North America &
Digital Solutions Leader**

*Joined 2025
Ex-Emerson*



Jussi Vanhanen
Chief Product Officer

*Joined 2021
Ex-ABB*



Katri Piirtola
Chief Aftermarket Officer

*Joined 2026
Ex-Kone*



Hanne Peltola
Chief People Officer

*Joined 2023
Ex-Valmet*

Industrial technology and electrification leaders assembled around focused mission

KEMPOWER 2.0

A disciplined, global
DC fast charging leader
- built to compound.

- Attractive, fast-growing market
- Proven technology leadership, deep customer relationships
- Evolving from regional, hardware focused to global lifecycle leader
- Sustained profitable growth focus





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Kempower 2.0:
**Technology and product
leadership creating
customer value**

Jussi Vanhanen
Chief Product Officer

Kempower 2.0

Creating customer value



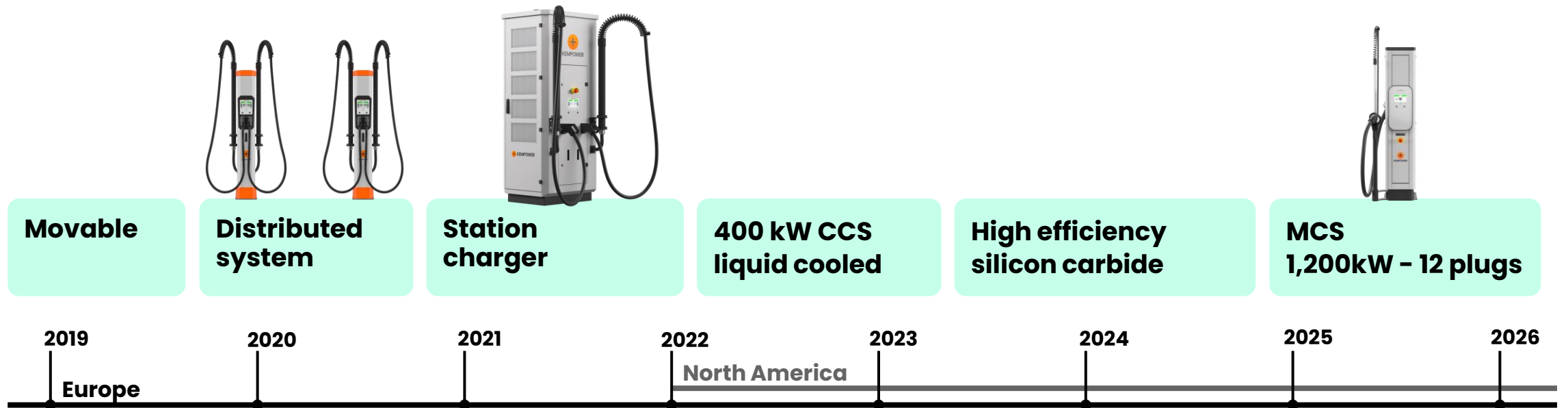
Peak powers

- Static systems
- Peak power
- EUR/kW

Intelligent Platform

- **Minimized** CAPEX
- **High** efficiency
- **Planned** OPEX
- **Maximum** uptime
- EUR/kWh

Our Evolution: Six years of market leading distributed systems

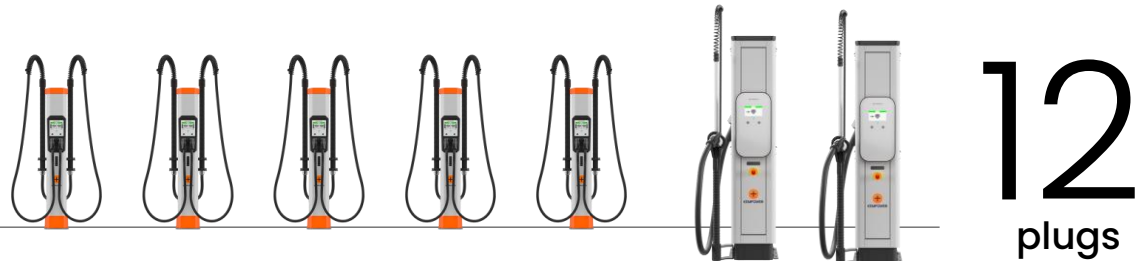


MCS: Megawatt charging system
EMS: Energy management system

Kempower product portfolio covers all segments

Distributed system

50 - 1,200 kW
Power unit



- Dynamic power sharing
- Scalable 50 kW to 1,200 kW
- Multiple connector types for all segments and regions

Station charger

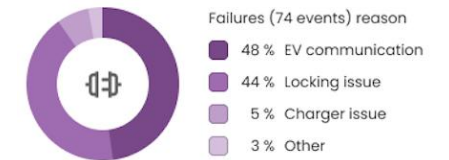


50 - 400 kW

- All-in-one solution
- Single-point fast charging
- Easy to install and operate

ChargEye Software

Technical success rate **94.8 %**



Total sessions	Sessions daily avg	Sessions on CCS daily avg	Sessions on CHAdeMO daily avg
8 568	386	6.5	2.3
Up 7.8 % ↗	Up 7.9 % ↗	Up 8.7 % ↗	Down 11.2 % ↘



- Service cloud
- Energy cloud
- Charging cloud

Kempower differentiation

Five engineered advantages that compound into industry-leading economics

01

DISTRIBUTED

Flexible layout

50% LESS REAL-ESTATE

02

DYNAMIC

Dynamic power sharing

30% HIGHER UTILIZATION

03

MODULAR

Scales up for various applications

99% UPTIME

04

INTELLIGENT

AI-driven ChargEye cloud

100% CONNECTED

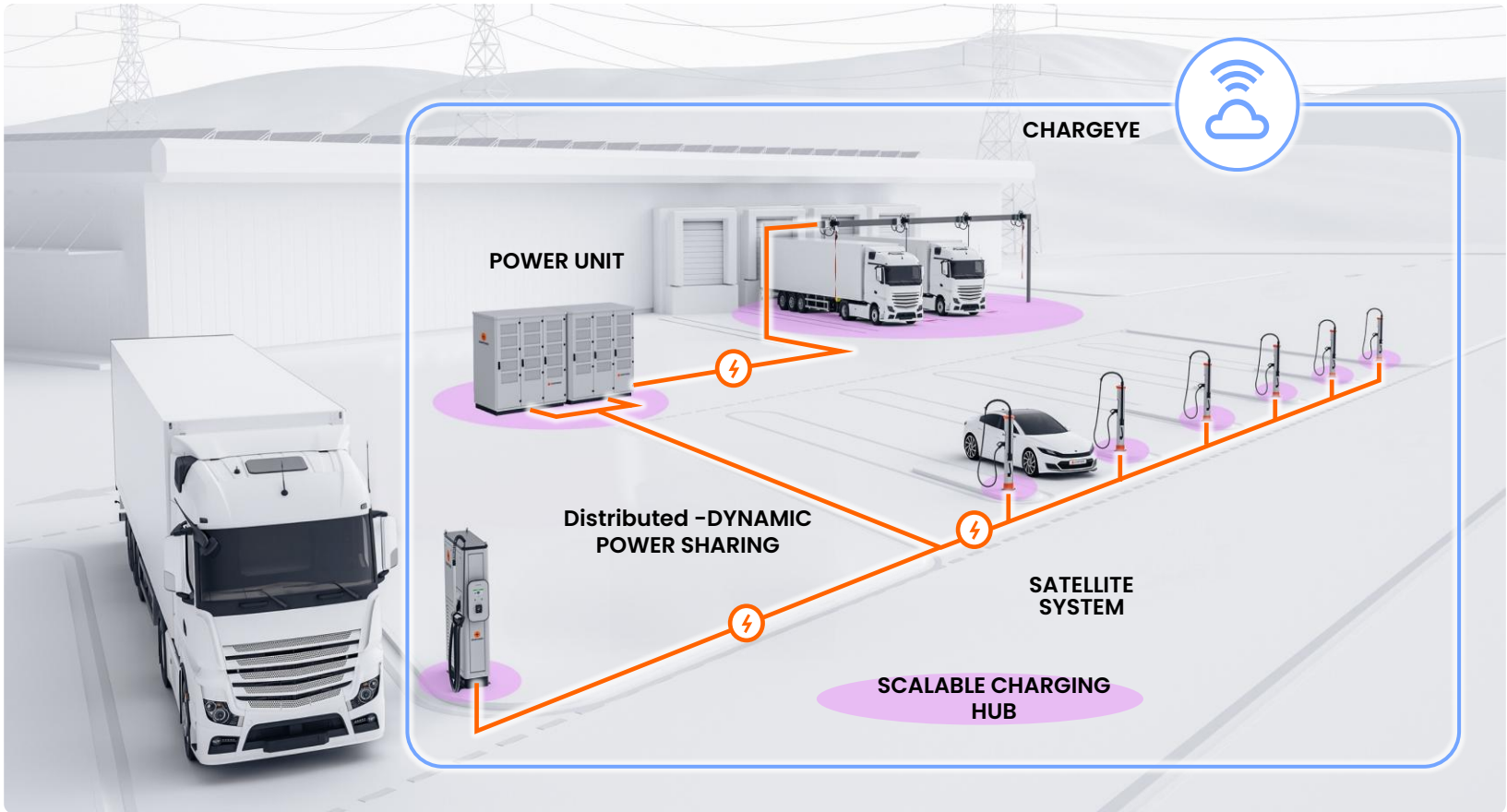
05

THE BEST USER EXPERIENCE

Built for seamless, easy and accessible

INDUSTRY LEADING SUCCESS RATE

01 Distributed System for building better sites

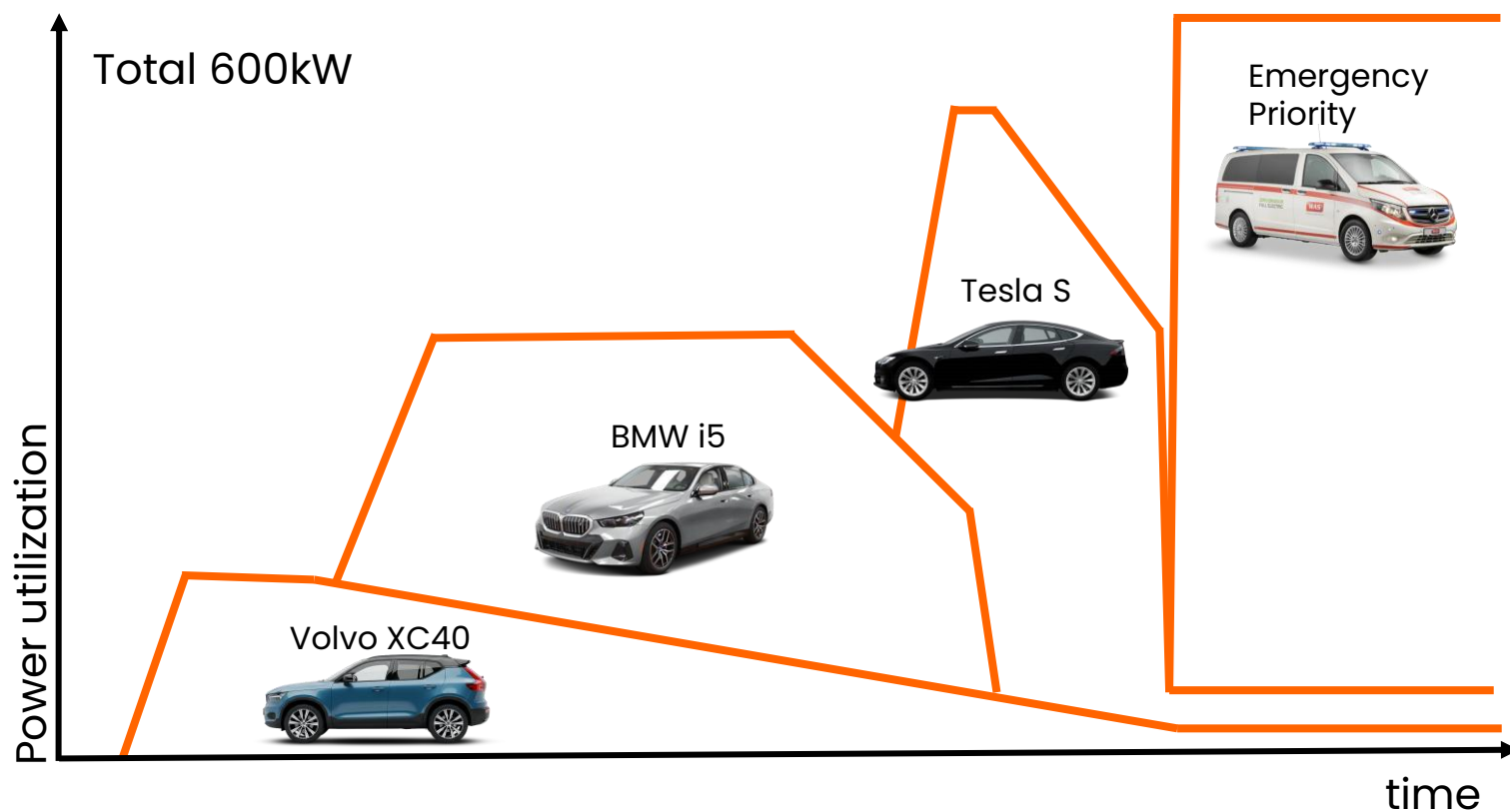


1 Improved site layout
Flexible placement of charging points

2 Reduced space requirements
50% space savings

3 Maximized grid utilization
30% energy through same grid connection

02 Dynamic Power Sharing allocating power according to vehicle demand



- 1 Higher Power Utilization**
Dynamically distribute power when vehicle demands change
30% higher utilization
- 2 Improved System Availability**
Redundant architecture ensures charging even with system issues
99% uptime
- 3 Intelligent Charging Priorities**
Power allocation can be prioritized and scheduled

03 Modular and scalable

One platform, hundreds of use-cases



Different dispensers
for various customer needs



Public charging



Bus fleets



Port & off highway



Truck fleets

04 Intelligent AI-driven cloud software

Optimize service quality

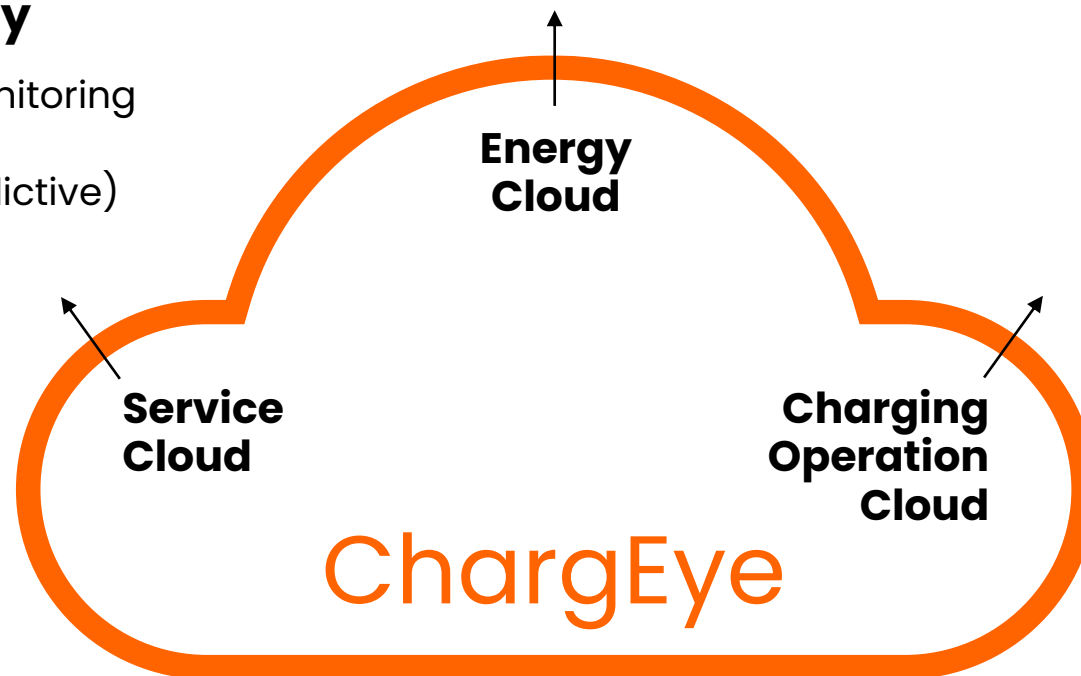
- Proactive system health monitoring
- Maintenance optimization (AI-driven preventive & predictive)

Enable smart energy

- Energy cost optimization
- Peak shaving

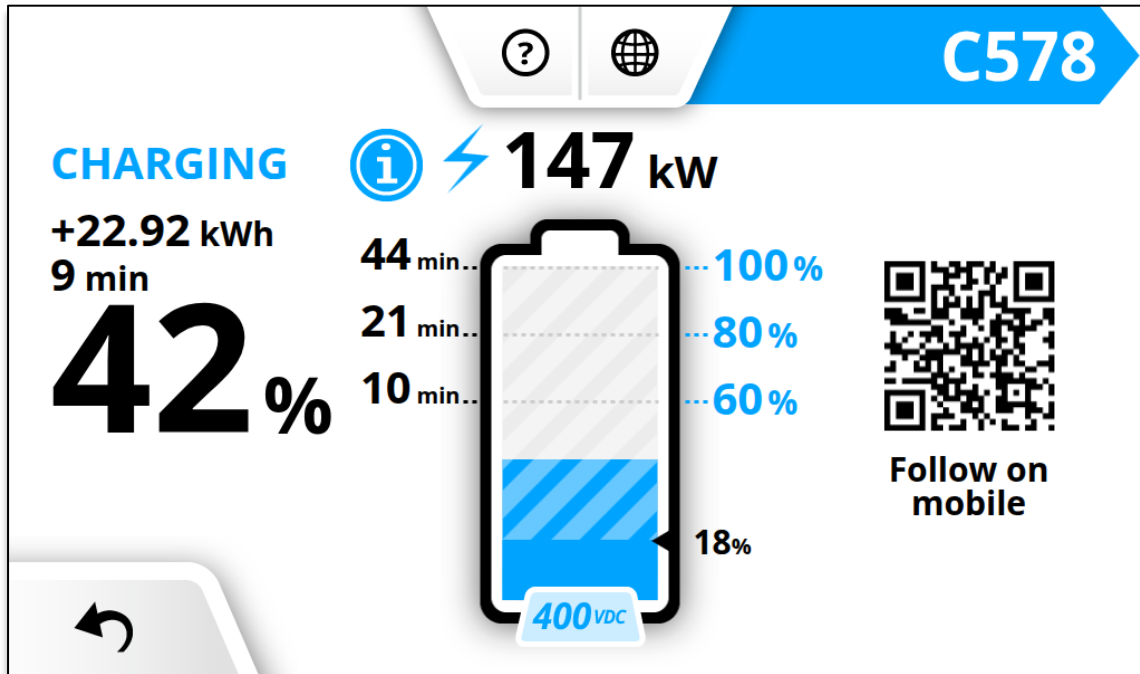
Assure mission critical operations

- Vehicle recognition
- Charging time estimates
- Scheduling and optimization
- Fleet state-of-health

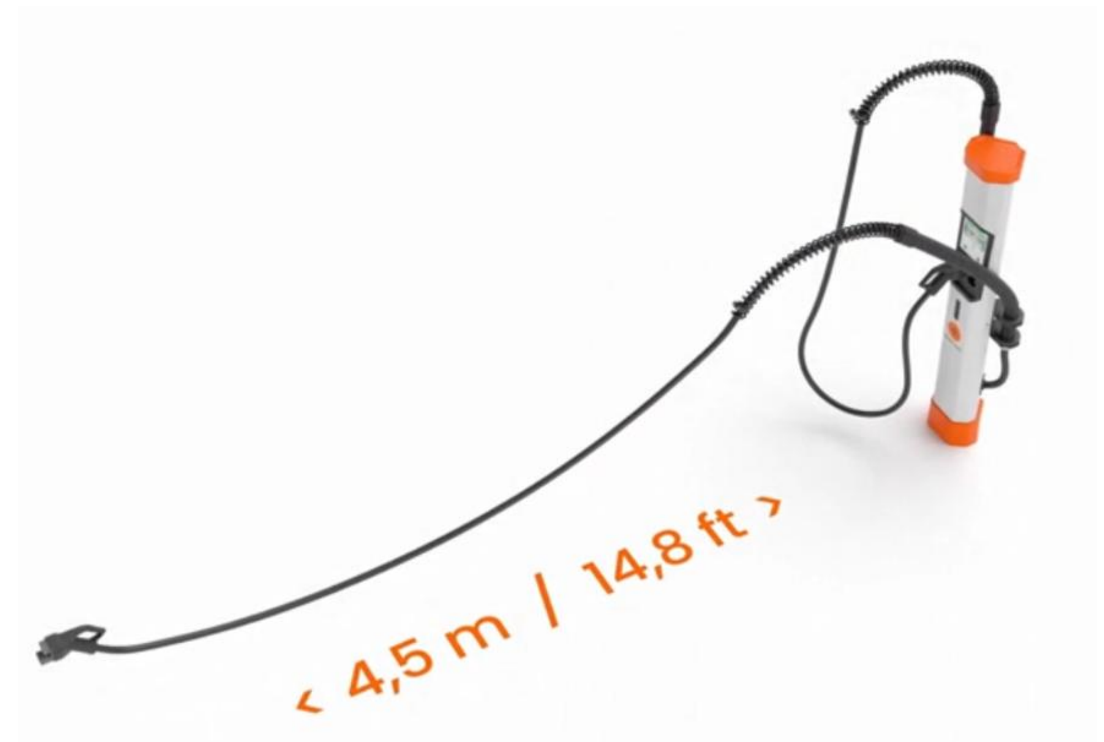


05 User experience loved by EV drivers

1 Best-in-class user interface
AI charging time estimation, follow-on-mobile

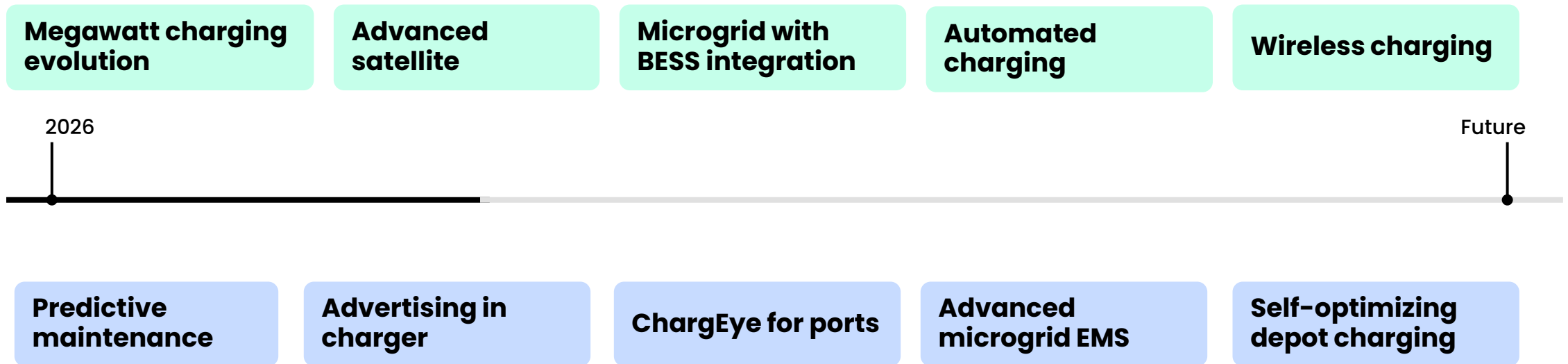


2 Cable management with reach
Compact and user-friendly cable management with ultimate reach



Product portfolio

Future Innovation



BESS: Battery energy storage system
EMS: Energy management system

MCS – Truck charging of the future

World premiere: 1,000kW charging power from single plug

First MCS installation in the world | The biggest installed base

First MCS installation in USA, California



Proven microgrid deployments with BESS

Reference installations

Bredden, Stockholm

Alecta Fastigheter

150 kVA / 280 kWh BESS
400 kW Kempower Power Unit



Norrköping, Sweden

Alfredsson Transport

2× 600 kVA BESS
4× 600 kW Power Units + MCS



Oskarshamn, Sweden

Erinion / Scania Logistics

600 kVA BESS
4× 450 kW Power Units



Iceland

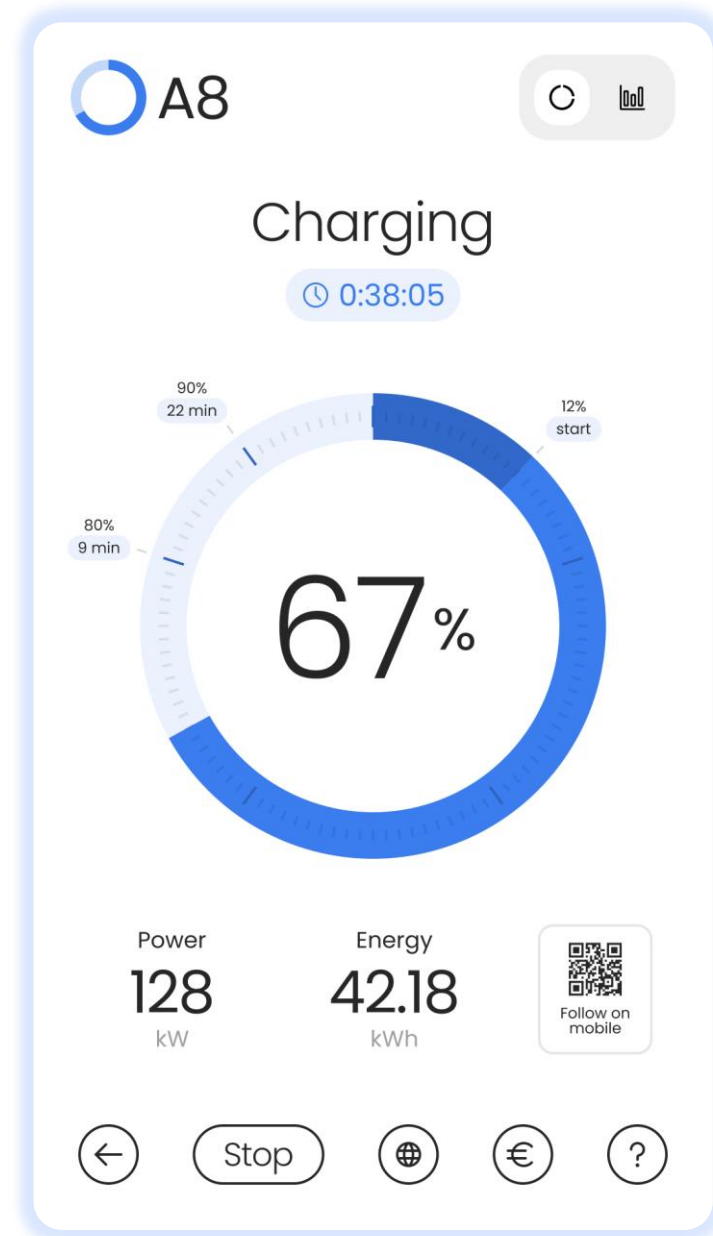
Orkan

300 kVA / 420 kWh
Compact hub on 63A grid



Next Generation Satellite system

- + Fast installation and deployment
- + All-new user interface
- + Great customer branding



Conclusion:

We deliver M+RE

- Better than 99% uptime
- 100% intelligent platform
- Up to 20% better TCO

TCO: Total cost of ownership





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Kempower 2.0:
Winning with customers -
Accelerated share gain and
expansion in Europe and Asia-
Pacific

Mathias Wiklund

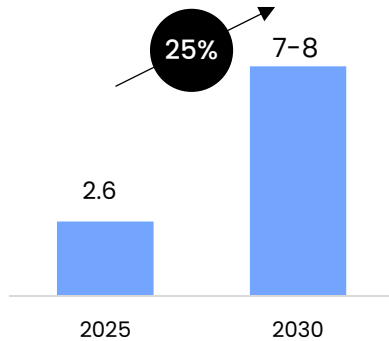
Chief Sales Officer

Europe's market: Large and growing at 14% CAGR to reach EUR 6.2 bn by 2030

Accelerated BEV adoption

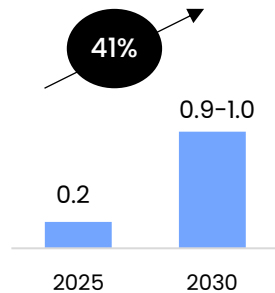
New passenger vehicle in million units

% CAGR



New commercial vehicle in million units

% CAGR

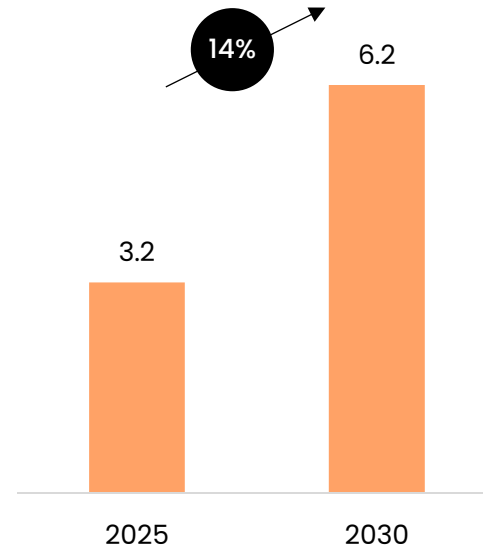


TAM: Total addressable market

Large and fast-growing market

Europe - DC charging market TAM, € bn







% CAGR



Source: Kempower market model Base scenario.

DC fast charging focus

Public funding B€

E-Truck Charging Hub		 1.6
Zero Emissions Truck & Van		 1.2
AFIR Initiative		 1

>3B€ public funding

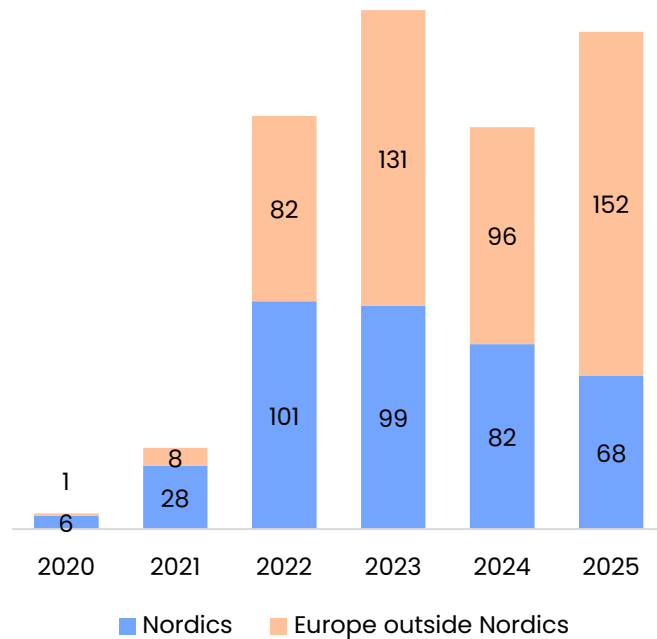
Tightened emission reductions and energy security are strategic imperatives

- CO₂ emission reductions
- Oil price
- Cultural values

Kempower Europe: Beyond the Nordics, a multi-billion EUR TAM

Our European journey so far

Order intake Europe M€



Nordics include Finland, Sweden, Norway Denmark and Iceland

Kempower 2.0

- From Nordics to central and south Europe.
- Large customer focus driving volume, product innovation and quality
- Adding new customers securing continued growth
- Best-in-class products & service with best TCO

We win with leading customers in every segment across Europe

Public charging	CPO	powerdot	RECHARGE DRIVING CHANGE	Osprey EV Charging Network	AMPOL	gentari	ENGIE Vianeo	eviny	mer	e-on
	Retail	CIRCLE K	Sainsbury's	STI	TotalEnergies	Arnold Clark	OMV	SS	NESTE	
Fleets	Trucks	DSV	ASKIO		DAIMLER TRUCK		VOLVO TRUCKS		TRATON	
	Bus	KEOLIS	transdev the mobility company	Nobina	WY	Qbuzz	POSTBUS a member of DB	VDL BUS & COACH		
	Ports	APM TERMINALS Lifting Global Trade	PSA	CMA CGM	DP WORLD		MSC MEDITERRANEAN SHIPPING COMPANY		KALMAR	

Why customers choose Kempower: Zunder – Charging point operator

About: Zunder is a leading ultra-fast EV charging point operator in Southern Europe, active in Spain, France, and Portugal, operating more than **2,200 charging points** across **650+ charging stations**.

Why Zunder choose Kempower:

Small footprint allows flexibility, more cost-efficient installations

Reduced noise for the customer due to distributed system

Dynamic distribution for optimal grid connectivity



Why customers choose Kempower: TPER – Fleet operator

About: TPER Group a public transport operator in Italy, running regional and urban bus services (including Bologna) as well as rail operations. They operate **500 buses** of which **137 are BEVs**.

Why TPER choose Kempower:

**Modular & flexible
power units**

**Economical solution to
build & operate**

Strong teamwork



Conclusion: Accelerated market share gain in Europe

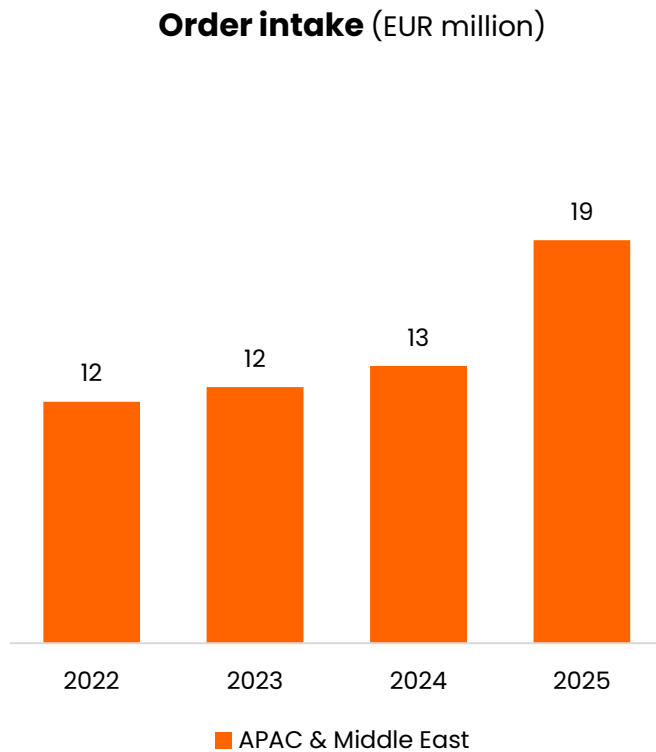
- Nordic leader, deepening share-of-wallet with the region's largest CPOs and fleets
- Rest of Europe scaling up fast, led by DACH, UK, Benelux and Southern Europe
- Large customer and new customer acquisition focus, with multi-year, multi-country deployment pipelines



Photo: MCS chargers at DP World's port in London Gateway

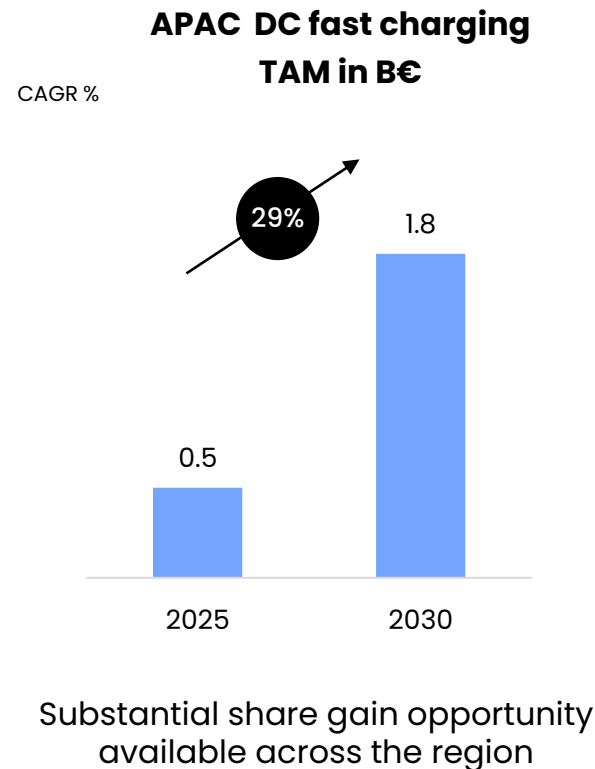
Kempower 2.0 Asia-Pacific: Disciplined entry into a fast-growing market

Strong order intake growth since 2022



Source: IEA, Bloomberg NEF

Fast-growing total addressable market



TAM includes the Middle East

Source: Kempower market model Base scenario.

Kempower 2.0 approach

- Expand selectively and grow in focused countries
- Leverage existing blue-chip relationships to enter new countries with demand already secured
- Win with new customers where our distributed architecture wins on TCO
- Utilize local partners to accelerate reach

Kempower 2.0: Scaling with local and global customers across Asia-Pacific

Australia



Malaysia



India



Singapore



Thailand



We play in every segment: Our success with global customers gives us access to the Asia-Pacific market

Selected Customer Logos Across Segments

Public charging	CPO	powerdot	RECHARGE DRIVING CHANGE	Osprey ENERGY STORAGE	AMPOL	gentari	ENGIE Vianeo	eviny	mer	e-on
	Retail	CIRCLE K	Sainsbury's	ST1	TotalEnergies	Arnold Clark	OMV	SEB	NESTE	
Fleets	Trucks	DSV	AS/KO	DAIMLER TRUCK	VOLVO TRUCKS	TRATON				
	Bus	KEOLIS	transdev the mobility company	Nobina	WY	Qbuzz	POSTBUS	V&L BUS & COACH		
	Ports	APM TERMINALS Lifting Global Trade	PSA	CMA CGM	DP WORLD	m sc MEDITERRANEAN SHIPPING COMPANY	KALMAR			

Why customers choose Kempower: Charge Hub- Sales and service partner

About: Charge Hub Group specializes in commercial, fleet, and heavy vehicle charging solutions and is a Sales and Service Partner to Kempower with locations in UK & Australia

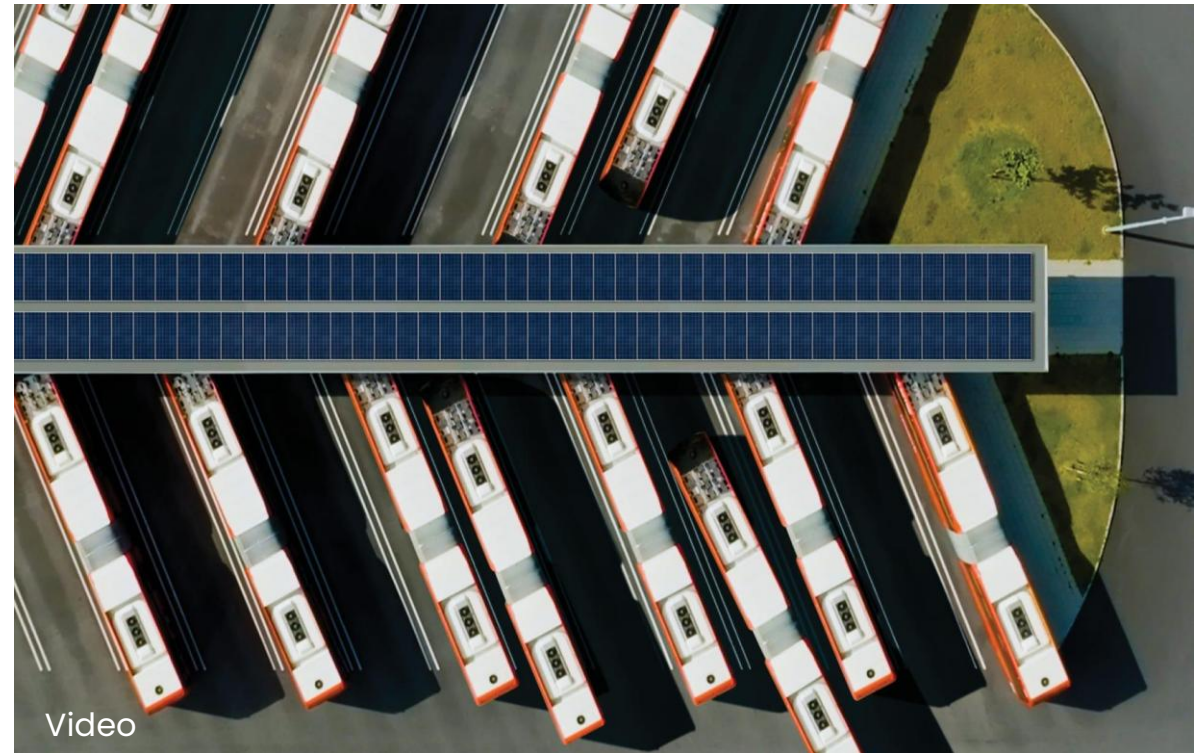
Why Charge Hub choose Kempower:

Proven, reliable & trustworthy products

Global reach, global opportunities

Strong solution support & best in class service

Teamwork with Kempower during product lifetime



Conclusion: Tremendous growth potential in Asia-Pacific

- Fast growing region in our addressable market
- Expanding via global customers and selective new customer acquisition
- Utilize local partners to accelerate reach





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May 26, 2026

Kempower 2.0: Geographic expansion – our North America success story

Monil Malhotra

President, North America & Digital Solutions Leader

North America: Established a resilient market presence after entering the market

Well positioned for future



Our team is 100+ strong

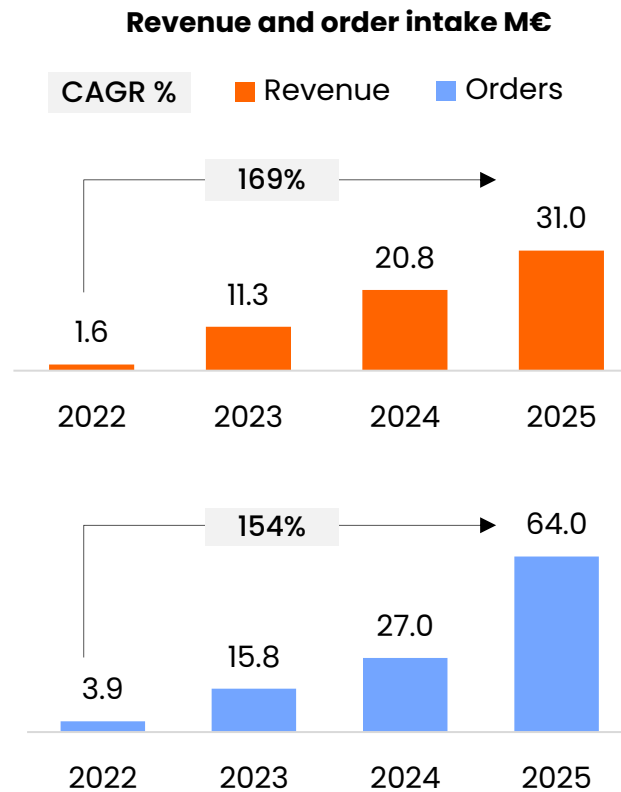
2025 Strong order intake and revenue growth – accelerating market share growth

2024 "Made in America" products shipped to customers from Durham

2023 Durham, NC chosen as North American hub for production and growth

2022 Kempower enters North American market

Delivering above-market growth



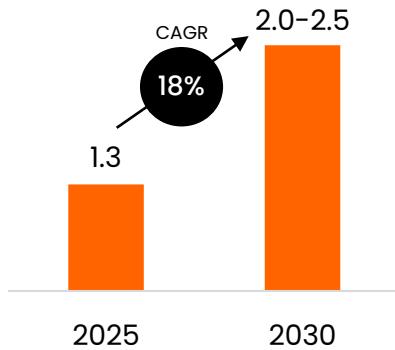
Rapidly growing installed base



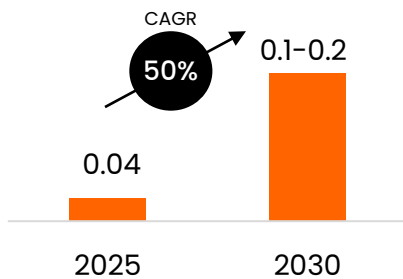
North America is a large and accelerating TAM: 29% CAGR, EUR 2.5 billion TAM by 2030

Accelerated BEV Adoption

New passenger vehicle (million units)

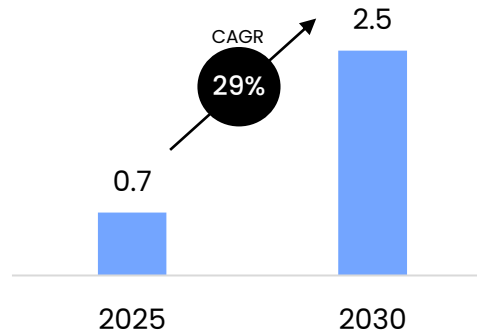


New commercial vehicle (million units)

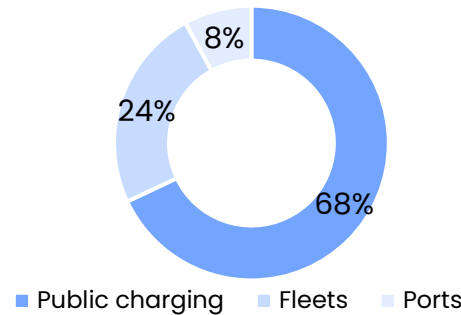


North America TAM 2030

North America - DC charging market TAM (bn€)



TAM by segments (€bn)



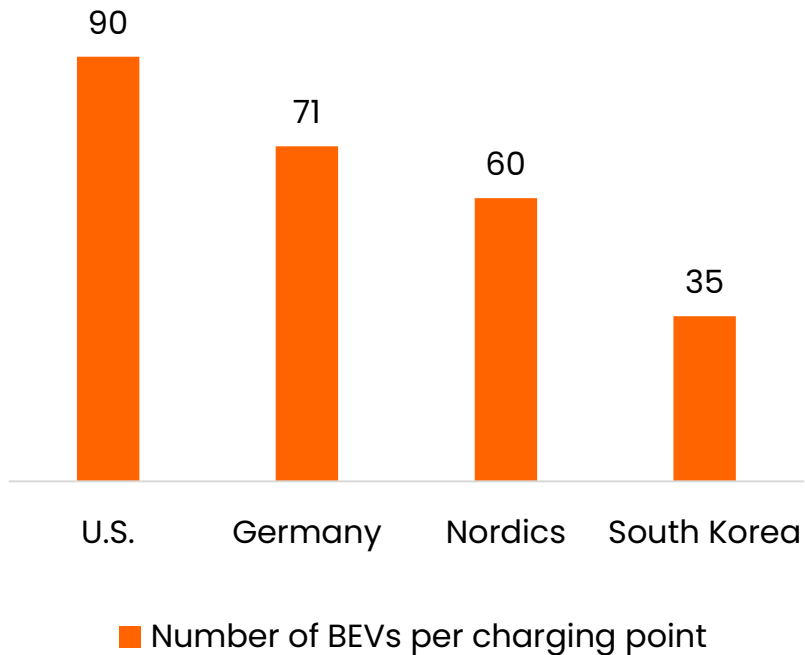
DC fast charging public funding

- Federal funding reactivated, with \$2B of \$5B remaining
- Multiple state funded incentives available
 - California - \$55M with CALeVIP
 - Illinois - \$160M with state utilities
 - New York - \$1.2B with EV-Make Ready Program
- \$3B in EPA funding allocated to port electrification

Secular tailwinds: A foundation for sustained growth

BEV to charger ratio

The demand for electrification far exceeds the current supply



Sources: S&P Global Mobility, March 2025; IEA Global EV Data Explorer May 2026; EV charging statistics 2026, Zapmap; Trafikanalys (trafa.se), SSB, EV-Volumes, Roland Berger EV Charging Index survey 2025; VDA E-Charging Network Ranking, November 2025

EV Price Parity

32 new electric passenger vehicle and 2 heavy duty models to be released in 2026

- The average EV price continue to drop
- The price gap between ICE vehicles and EVs continues to reduce
- High production capacity of heavy-duty trucks already in place

Sources: Kelley Blue Book Report: New-Vehicle Price Increases Accelerate in March As Large Trucks and SUVs Gain Share April 2026

Off-highway segments

Port segment is set for electrification

- Ports globally contribute 11% of greenhouse gas emissions (GHGE)
- On average, ports can reduce emissions by 80% by electrifying their operations
- Prices of electric port equipment is decreasing, achieving total cost of ownership (TCO) parity

Sources: International Energy Agency. CO₂ Emissions from Fuel Combustion. (2018); Electrifying ports to reduce diesel pollution from ships and trucks and benefit public health, International council on clean transportation (2023)

High uptime, full solution stack, and our hardware architecture: Competitive differentiators for the North American market

Driving high utilization while ensuring a site's readiness for future peak demand

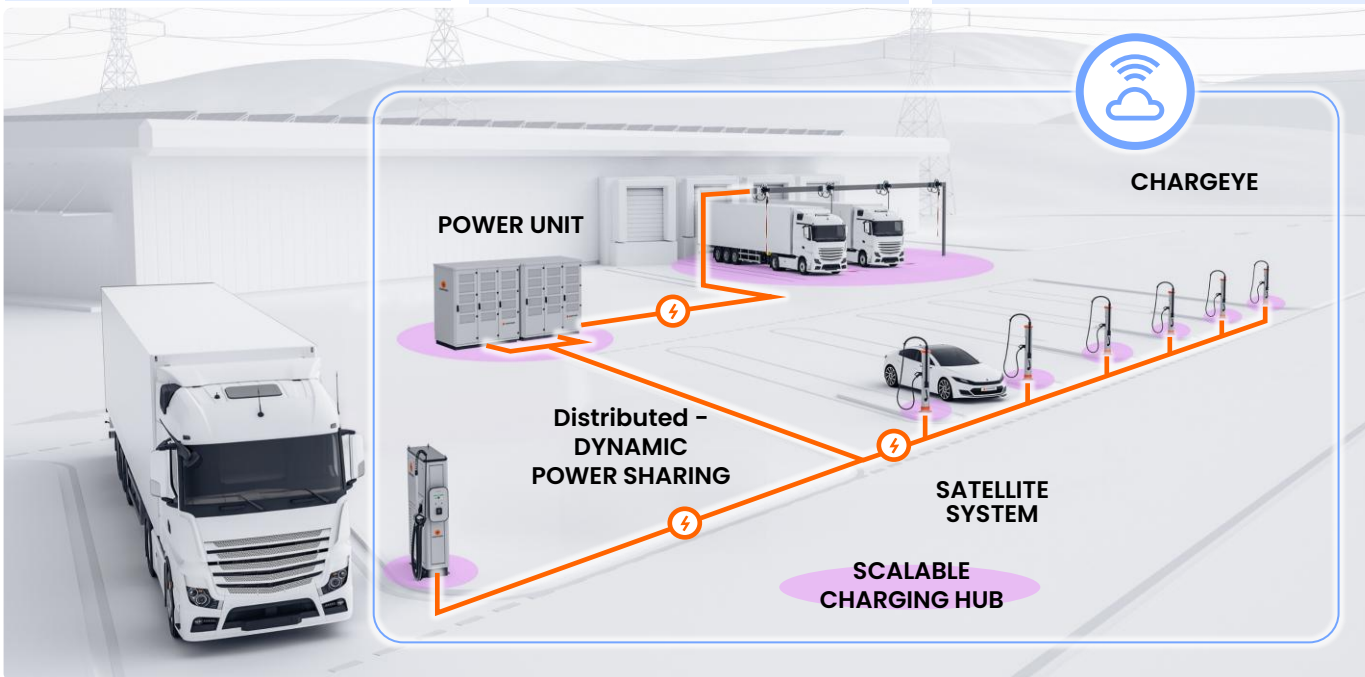
DISTRIBUTED - DYNAMIC
30% HIGHER UTILIZATION

MODULAR
99% UPTIME

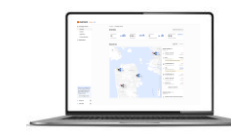
SCALABLE
50% LESS REAL-ESTATE

SAAS SOLUTION
MAINTAIN + OPERATE + OPTIMIZE

COMPLIANT HARDWARE
TAILORED TO MEET MARKET SPECIFICATIONS AND STANDARDS



Service Cloud



Operations Cloud



Energy Cloud



Our sustainable technology differentiation: Validated by North America's leading operators

Blink · Urban CPO



ABOUT BLINK: Blink Charging Co. is a global EV charging player operating 100,000+ chargers across 25+ countries.

WHY KEMPOWER WON:

- ▶ **Reliability:** proven uptime across dense urban deployments
- ▶ **Scalability:** modular architecture matches multi-site rollout cadence
- ▶ **OPEX reduction:** dynamic load management lowers demand charges

OnPoint EV Solutions · Public Charging CPO



ABOUT ONPOINT: OnPoint EV Solutions is an Idaho-based EV charging player targeting 10+ sites in California, Idaho, and Washington by the end of 2026.

WHY KEMPOWER WON:

- ▶ **Reliability:** built for high-utilization public charging
- ▶ **Dynamic power sharing:** maximize throughput at power-constrained sites
- ▶ **Responsive service:** local support team resolves issues expeditiously

Why customers choose Kempower: PowerUp America on scalable, reliable, easy-to-operate fast charging

“When evaluating charging technology for our expanding network, four factors stood out.”

Joshua Turner · CEO, PowerUp America

01

ABILITY TO EXPAND

02

VISIBILITY INTO OPERATIONS

03

USER-FRIENDLY SYSTEM

04

RELIABLE CHARGING



Why customers choose Kempower: EV Realty on building a fleet network at scale

Will Quinn is the Director of Product and Operations at EV Realty; Factors that EV Realty considered when evaluating Kempower's hardware

01

MCS CAPABILITIES

02

DELIVER HIGH POWER

03

SAVE TIME AND MONEY

04

ABILITY TO EXPAND



Video

Conclusion:

Our North America success story

Significantly outpacing market growth

>169% CAGR

Since entering the North American market

Growing install base with market leaders

120 customers in 3 years

Including 10 market leaders

Strong sustainable differentiators

High uptime, full solution stack, and our hardware architecture

For continued success

North America is our highest growth market

We are partnering with the market leaders

To be stewards of the electrification journey





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Kempower 2.0: Digitally enabled aftermarket

Katri Piirtola

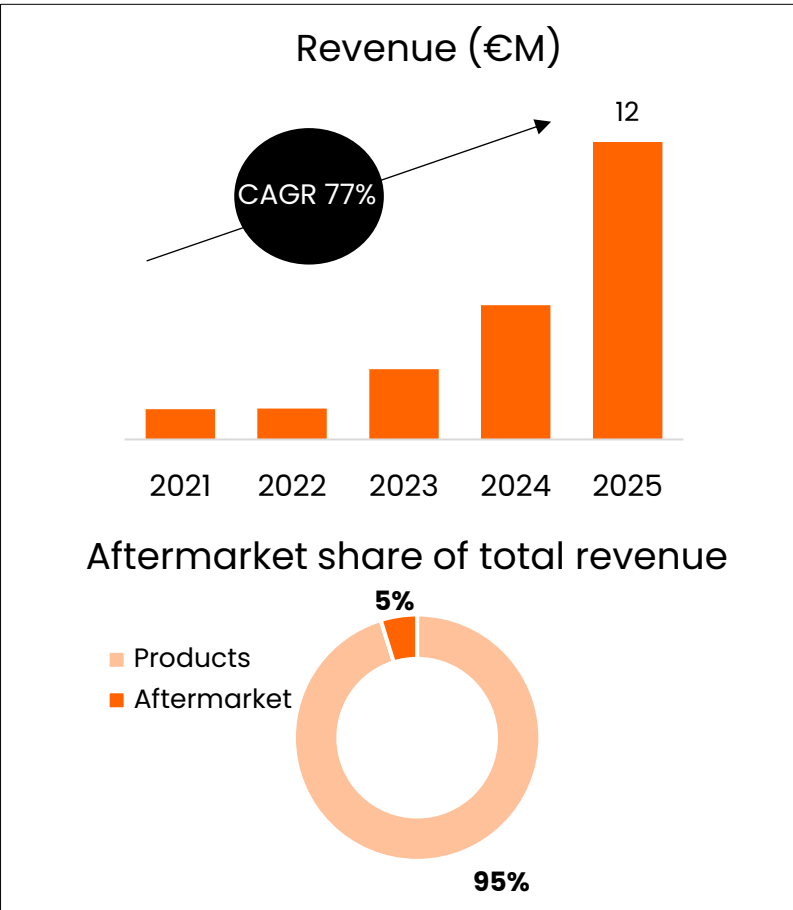
Chief Services and Aftermarket Officer

Monil Malhotra

President, North America & Digital Solutions Leader

Kempower aftermarket overview: strong foundations and ready to scale

Aftermarket revenue



Kempower service team and partners

In-house front-line technical support

60+ Service Engineers

20+ Countries

Localised, certified, and highly trained service partners

100+ Service partners

60+ Countries

1,500+ Trained service technicians

Digital capabilities

ChargeEye software

100% Install base connected

35M+ Sessions analyzed

Aftermarket opportunity: growing install base with recurring high margin value

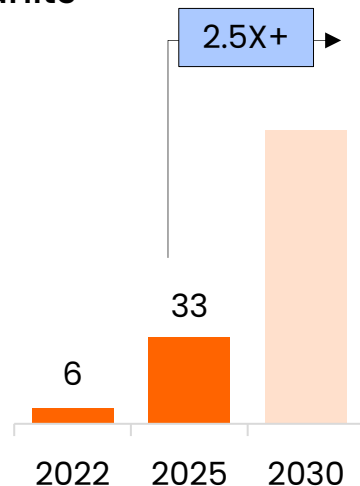
From kW to outcomes



- ✓ Hardware alone is not enough
- ✓ Customers value uptime and TCO
- ✓ Customers need confidence in their operations

Growing installed base

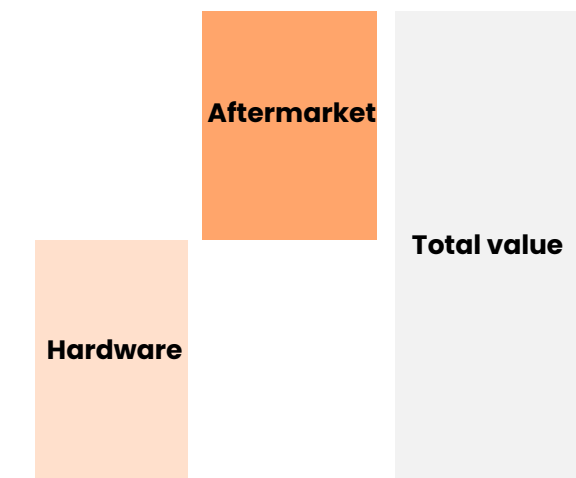
Kempower installed charging points '000 units



- ✓ More plugs being installed YoY
- ✓ Existing install base coming out of warranty

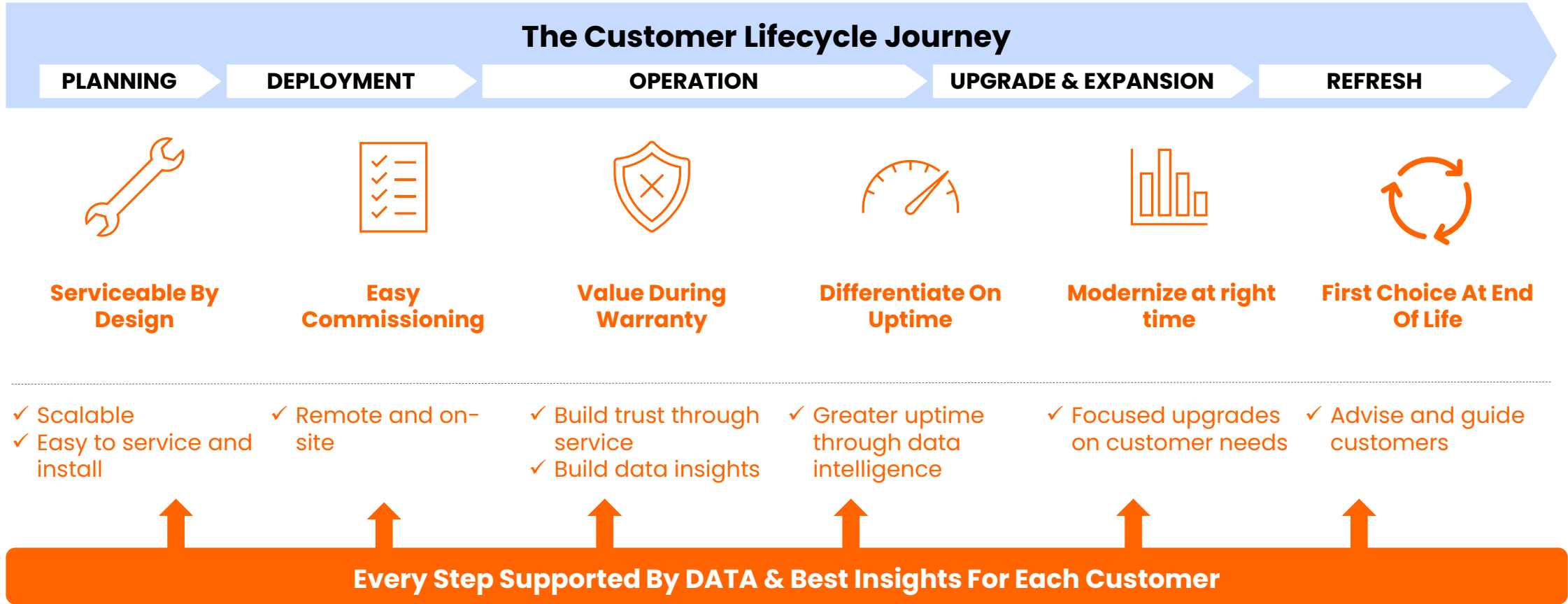
Aftermarket across the lifecycle

Charging point lifetime value



- ✓ High margin
- ✓ Recurring revenue

Aftermarket approach: We support our customers at every stage of their lifecycle journey




Lifecycle solutions: Four pillars building a leading position in aftermarket

1 PARTS CAPTURE




- Proprietary IP - own modules
- Tiered parts - OEM, 2nd tier, refurbished

2 SERVICE CONTRACTS




- Kempower led diagnostics, coupled with field service partners
- SLA-based service contracts
- World class uptime

3 MODERNIZATION & UPGRADES



- Module upgrades - higher efficiency
- Site and power expansion
- Retrofits - screens and payment terminals

4 SOFTWARE



- ChargEye subscription
- Three cloud platforms: Service / Energy / Operations

SLA: Service-level agreement

Creating value with customers through aftermarket solutions

CASE MODERNIZATION: UNLOCK MORE REVENUE FOR THE CUSTOMERS



9,000 charging points in 6 countries

Retrofit new plug standard across 70 satellites at 60 sites in Spain, Portugal and France – **more active plugs, more revenue, no rip-and-replace**

“Increased use, less queuing – the data already shows the upside.”

João Seabra, COO, Powerdot

CASE SERVICE CONTRACT: SLAs KEEP CUSTOMERS BUSINESSES RUNNING



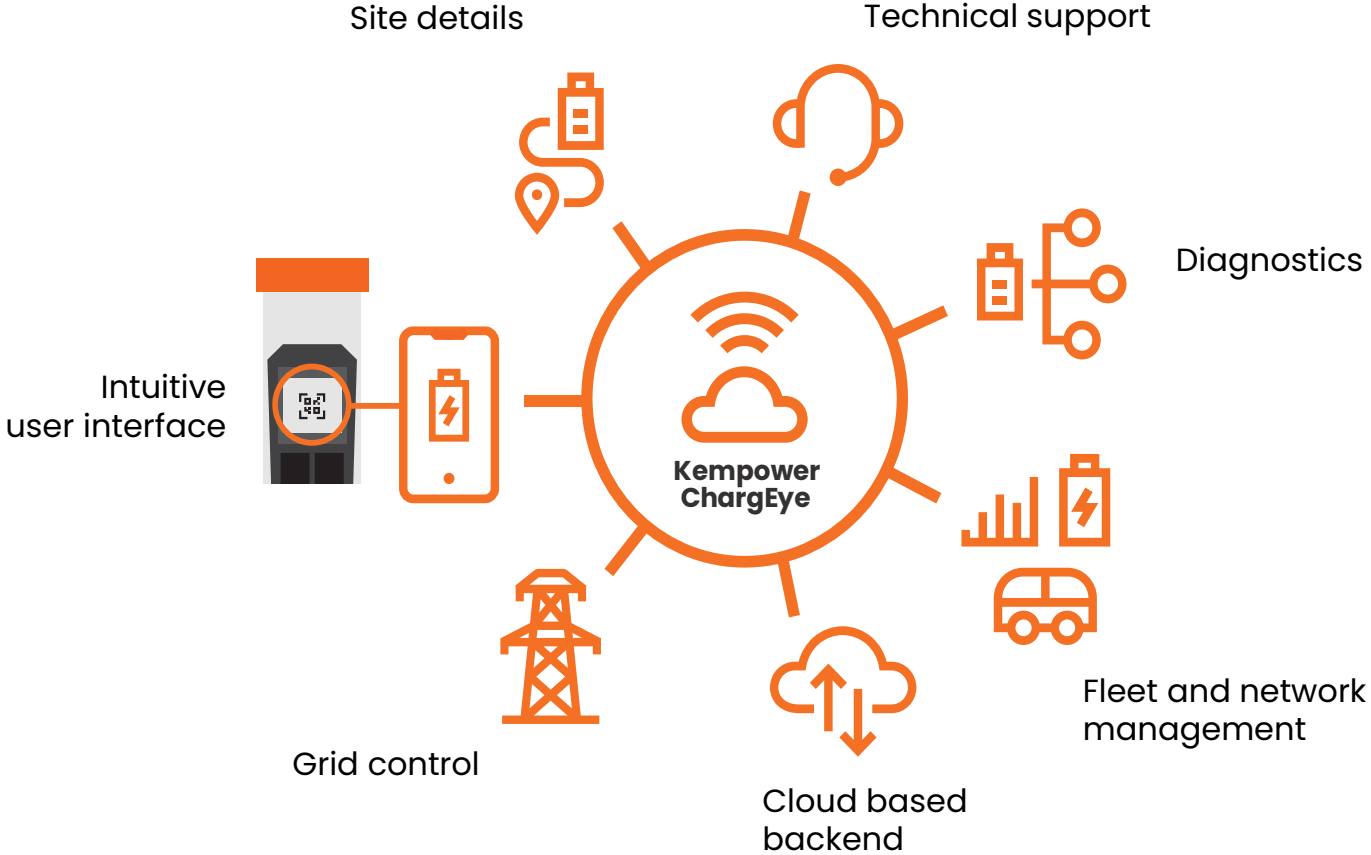
Major global retailer with Public and Fleet charging

Global framework for supply of Hardware and Services providing both public charging for their customers and electrifying their logistics fleets.


- ✓ **Guaranteed response & resolution SLAs** – no downtime surprises
- ✓ **24/7 Support as they scale** – Technical support needed
- ✓ **One partner across the lifecycle** – lower OpEx, predictable cost


Kempower digital solutions: Strong sustainable differentiator for the future

FROM KW TO TCO OUTCOMES... TO INTELLIGENCE




STRONG SOFTWARE CAPABILITIES ESTABLISHED

 **3 tiers**
Software offerings

 **50+**
Team members

SIGNIFICANT DATA LEVERAGE

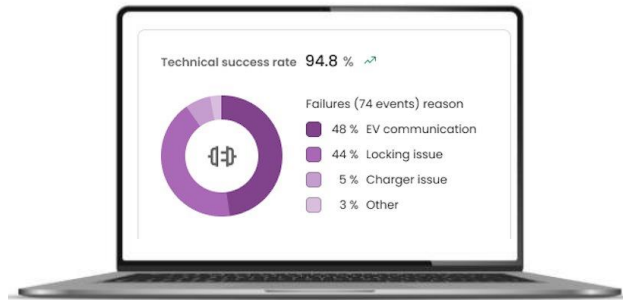
 **>120**
TB / year

data added to ChargeEye Cloud

Software offerings: Tiered cloud solutions to support all customer segments

Service Cloud

TIER I: ChargeEye Basic

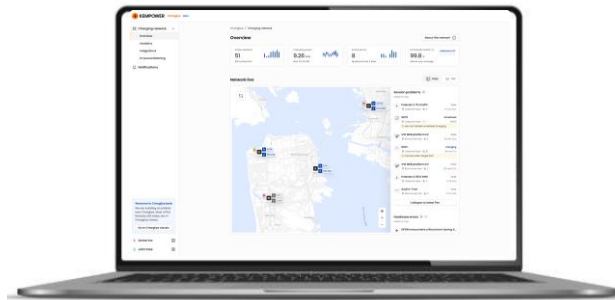


Asset and service management

- Vertically integrated monitoring & diagnostics
- Works alongside existing backends
- Visibility into uptime and performance

Operation Cloud

TIER II: ChargeEye Advanced



Commercial network management

- Advanced analytics, and operational intelligence
- Compliance & incentive reporting
- Works alongside existing backends for public charging

Energy Cloud

TIER III: ChargeEye Pro



Solution for fleet charging energy optimization

- Vehicle-specific scheduling to ensure on-time readiness
- Dynamic power sharing across chargers to meet fleet demand
- Intelligent charging to reduce energy cost

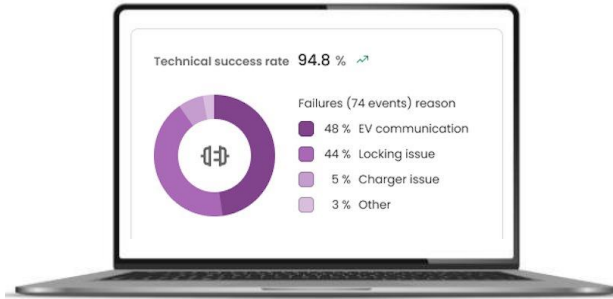
ChargEye delivers full operational visibility through essential diagnostics for charging point operators

Customer background



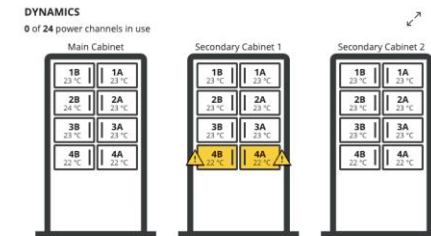
- A leading charge point operator in the UK, providing public charging for thousands of passenger vehicles
- 1,100+ Kempower charging points run on ChargEye

Our solution: ChargEye Service Cloud



- Remote monitoring dashboards
- Proactive maintenance avoiding high service costs

Customer benefits – impact



Alert details

When opening an alert, the error details view now provides structured information to guide you through resolution. For each error you can see:

- **What happened** - a short description of the error
- **What it means** - the potential impact on charging
- **What to do next** - clear instructions or recommendations

This information is tailored to the user role. End users and organization admins see high-level instructions, while service engineers have access to more detailed diagnostics and troubleshooting steps.

- ✓ Remote diagnostics allow for 99% uptime at multiple sites
- ✓ Average daily energy usage is 2.7 million kWh
- ✓ Reduced 50% of service site visits

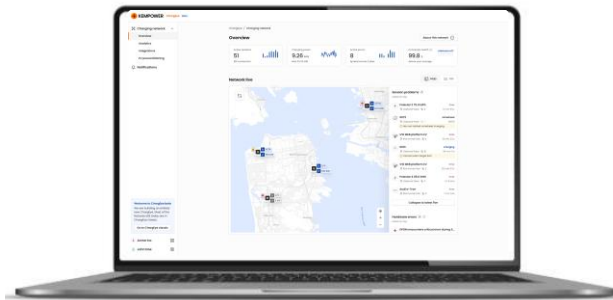
ChargEye's energy optimization provides full vehicle readiness, preventing penalties for fleet operators

Customer background



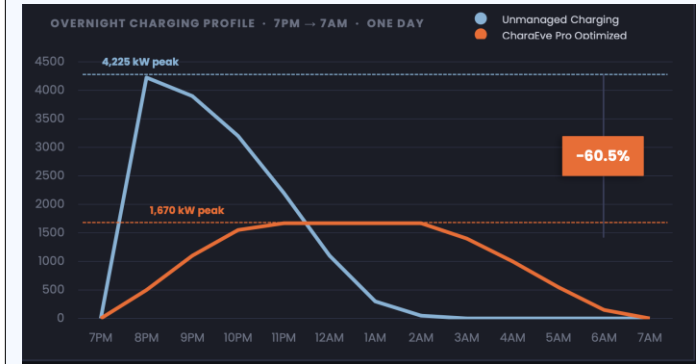
- Global public-transport leader operating buses, trains and mobility services across 15+ countries
- 300+ Kempower charging points run on ChargEye

Our solution: ChargEye energy cloud



- Remote monitoring dashboards
- Proactive maintenance avoiding high service costs
- 100% vehicle readiness avoiding high penalties
- Energy optimization

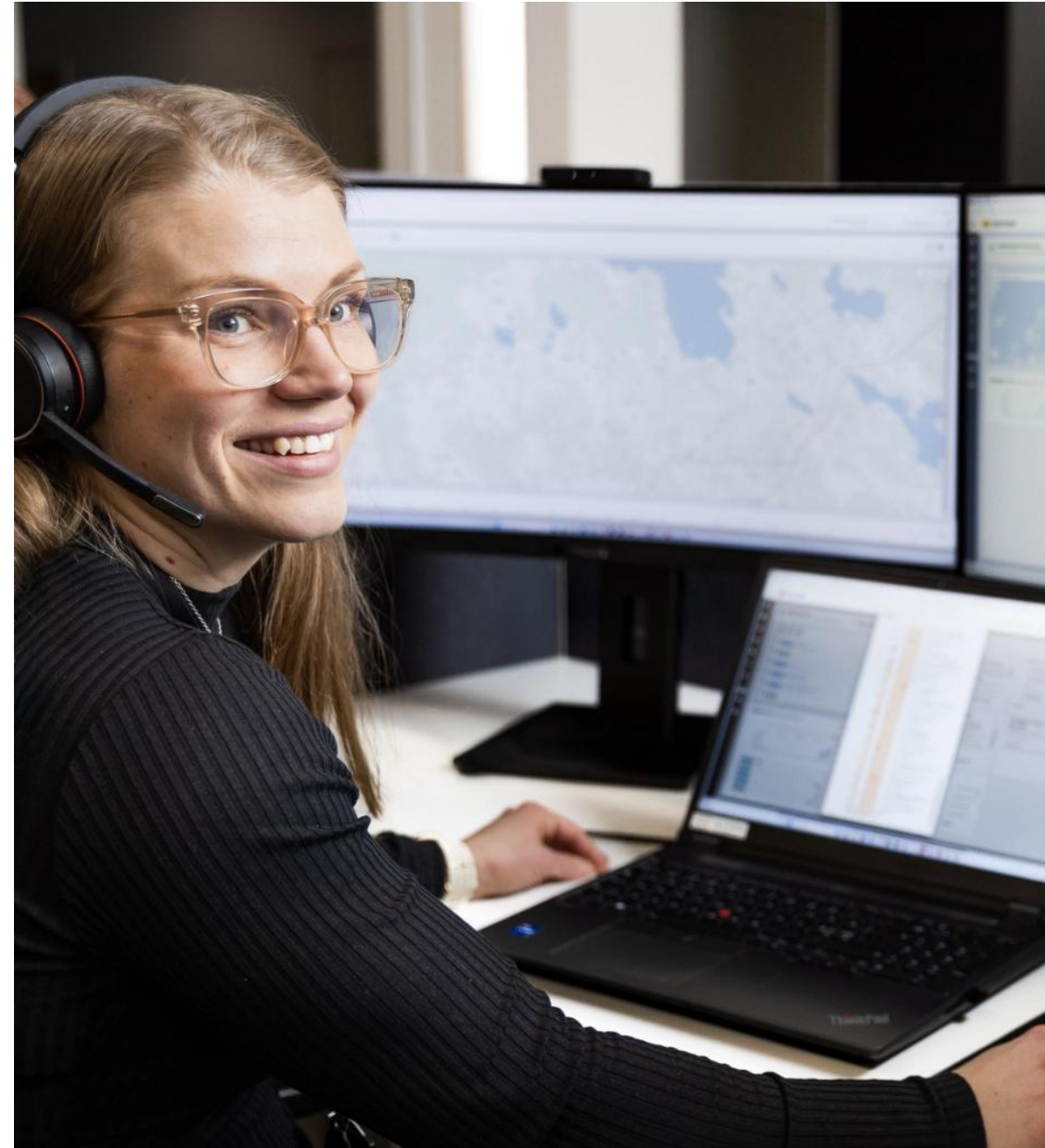
Customer benefits – impact



- ✓ AI-based charging optimization with ChargEye Pro saved an estimated 1M€ in energy costs per year across all their depots

Aftermarket – Now is the time

- **Aftermarket foundations in place and ready to scale**
- **Full support across the lifecycle that customers can trust**
- **Differentiated by our data and software driven approach**





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Kempower 2.0: Operational excellence - our competitive edge

Sanna Otava
Chief Operating Officer

Global manufacturing footprint: created for resilience and growth



NORTH AMERICA

Durham, NC

Since 2023

Products

Localized, BABA ready
(Build America – Buy America)

Coverage

US / CA / MX

Lower lead times, tariff-proof for the Americas



EUROPE

Lahti, FIN

Since 2020

Products

All lines, R&D pilots

Coverage

EMEA (APAC, US/CA/MX)

Innovation hub – co-located R&D and manufacturing

ASIA

Flexible footprint

Asset-light entry in progress

Products

Components, semi-finals

Coverage

APAC markets

Optionality preserved without capex commitment

Operational model created for flexibility and scale

IN-HOUSE · OWNED IPR & KNOW-HOW



- ✓ Product design – Hardware, firmware, software fully owned -> production knowledge
- ✓ Final assembly of all customer configurations

OUTSOURCED · SCALE THROUGH PARTNERS



- ✓ Power module and PCB (printed circuit boards) assembly – qualified suppliers, dual-sourced
- ✓ Metal & plastic parts – machining, welding, finishing core competence

Operational excellence: our true competitive advantage

1 DELIVERY EXCELLENCE



Customer Centricity

- On-time deliveries
- Flexibility

2 PRODUCTIVITY DRIVEN



Continuous Improvement

- 7% annualized productivity improvement target

3 HIGHEST QUALITY



Investments In Quality and ESG

- Quality and sustainability embedded throughout all operations

4 SCALABLE MODEL – ASSET LIGHT

1. Delivery excellence: customer centricity throughout on-time deliveries and needed flexibility

On-time delivery
>98%

- ✓ Regional manufacturing redundancy - Streamlined global production technology

Avg. 6 weeks lead time

- ✓ Modular architecture - product variants assembled
- ✓ Customer pilots with R&D

4 logistics hubs

- ✓ Regional and local
- ✓ 4 local logistics hubs for deliveries (Finland, France, USA, Australia)



2. Focus on **cost excellence and productivity** – delivering now

R&D + PROCUREMENT



- ✓ Design to cost – cost innovations
- ✓ Fewer components, fewer failures

SOURCING



- ✓ Should-cost methodology and supply chain negotiations
- ✓ Global sourcing and new suppliers at scale

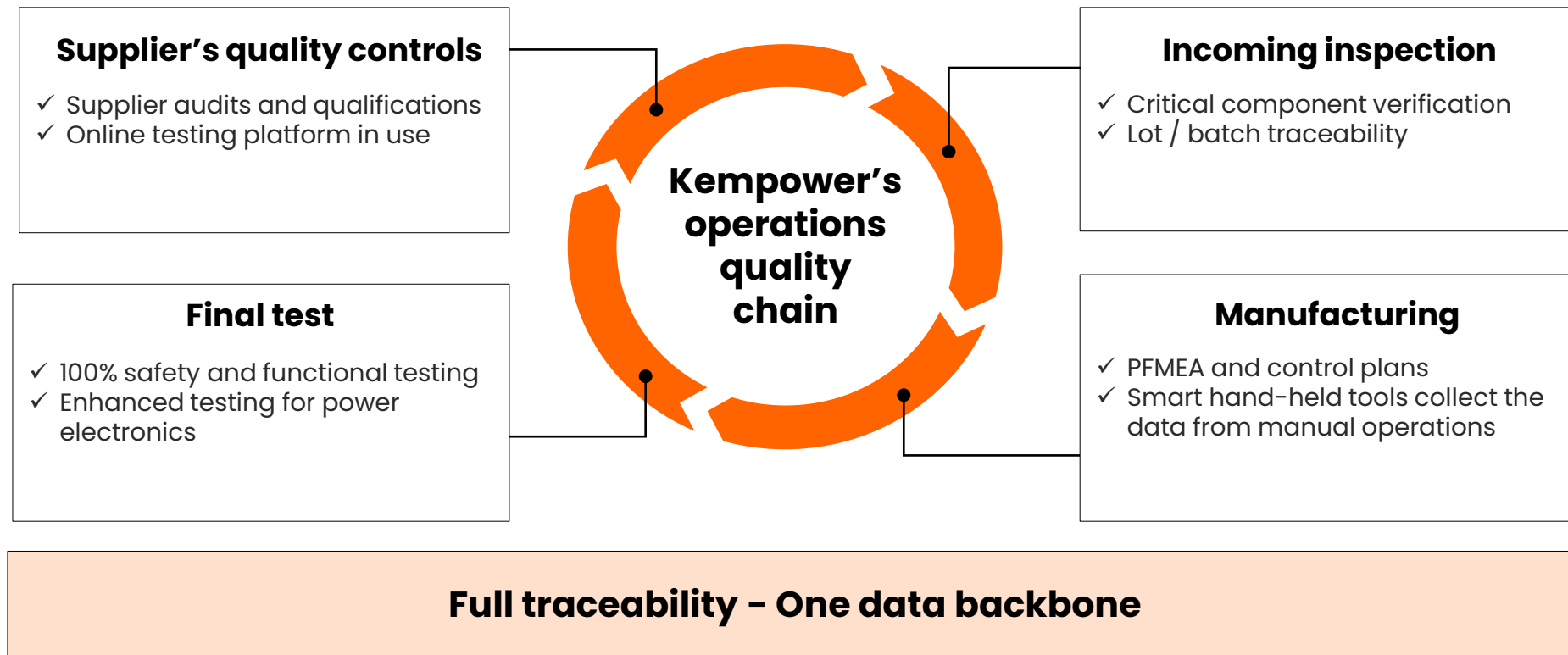
OPERATIONS



- ✓ Optimize production methods and material flows
- ✓ Digitalization, automation, AI

PRODUCTIVITY UPLIFT TARGET: 7% ANNUALIZED, THIS YEAR +10M€

3. Quality operations: Seamless quality from supplier to end-of-line



Sustainability in operations: a recognized sustainability leader – measured, certified, acting now

E ENVIRONMENTAL
Low-carbon operations

Carbon footprint- SCOPE 2 AND SCOPE 3

- ✓ Implementing 3-5 projects annually on the reduction path
- ✓ 100% Renewable electricity in operations in Europe

Product circularity

- ✓ Refurbishment services scaling globally

S SOCIAL
People and partners

Responsible supply chain

Supplier Code of Conduct, audits and risk screening

Workforce safety – LTIF

Zero-injury target, training across sites

G GOVERNANCE
Transparent and trust

Product Compliance

CE, UL and local regulatory readiness

Reporting

CSRD-aligned disclosure

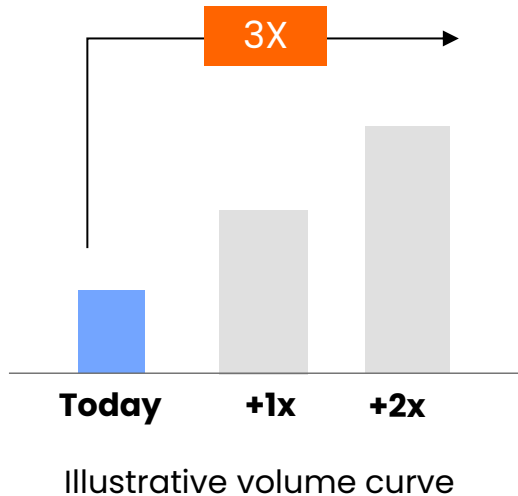
Certified Excellence:

Quality • Sustainability • Safety •
Cybersecurity | ISO 9001 • 14001 • 45001 •
27001:2022



4. Scalability: Production set-up enables us to reach our financial target

CAPACITY HEADROOM



ASSET-LIGHT MODEL



- ✓ Asset-light final assembly with strong regional supply chains
- ✓ Outsource / insource

WORKFORCE ON DEMAND



- ✓ Production workforce can 2x in 12 weeks
- ✓ Flex contracts and partners
- ✓ Effective Training model with job rotations

3X CAPACITY FROM EXISTING FOOTPRINT

Production capacity = facility + production asset + available workforce

Conclusion: Operational excellence – Kempower's competitive advantage

- Customer centricity
- Driving cost excellence and productivity
- Scalability





Capital
Markets
Day

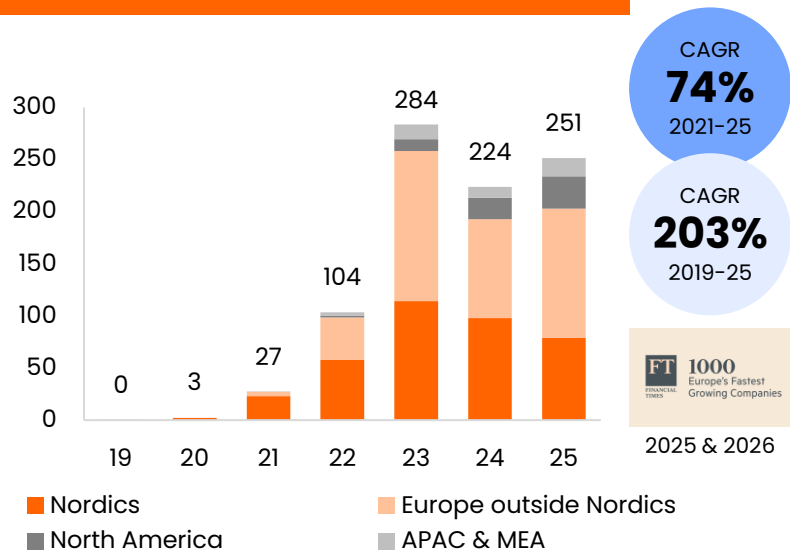
May 26, 2026

Kempower 2.0: Delivering sustained profitable growth

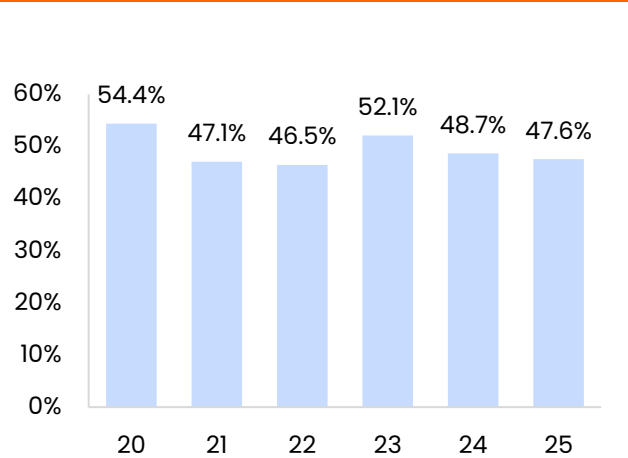
Jukka Kainulainen
Chief Financial Officer

Kempower at a glance: From zero to a leading industry player

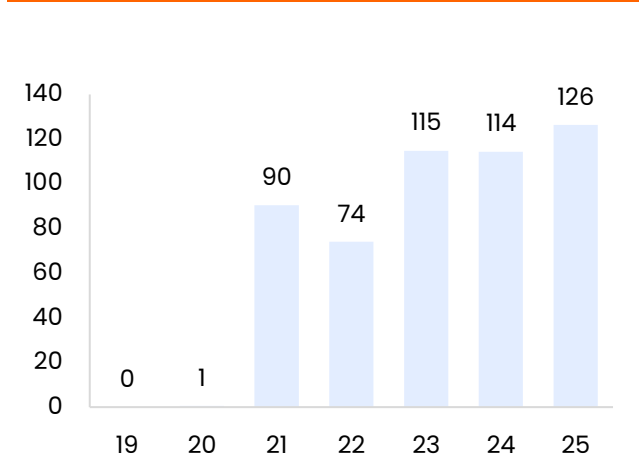
Revenue 2019-25 (MEUR)



Gross margin 2020-25 (%)



Liquidity¹ 2019-25 (MEUR)

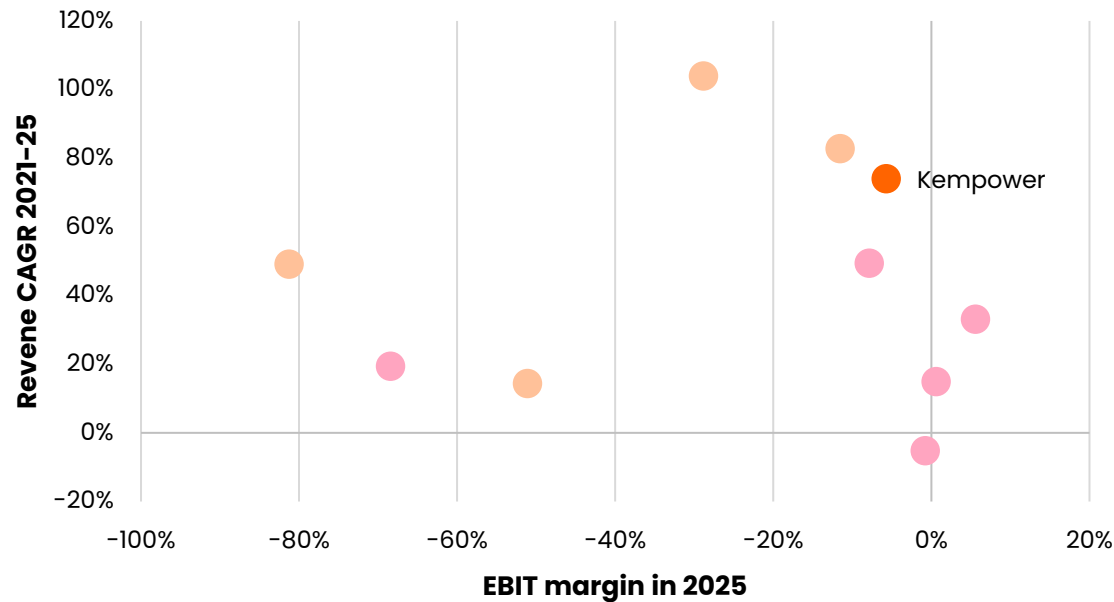


¹) Defined as cash and cash equivalents, other financial assets and unused credit facilities

Kempower has become a top 5 global player in just around 5 years
The scalable and asset-light business model together with strong liquidity enables continued share gain

Financial Position: Kempower is one of the financially strongest in the EV charging landscape

Revenue CAGR 2021-25 and EBIT margin in 2025 (%)



● = listed charge point operator (CPO) ● = charging hardware manufacturers



Kempower 2.0 value creation framework: Disciplined, profitable, compounding growth

Our formula for delivering compounding value

I Disciplined above-market growth in hardware

- Share gain, margin-protected growth
- Balanced global expansion



II Lifecycle revenue expansion

- Shift to materially higher services & aftermarket share of revenue
- Higher margin, higher predictability



III Operating profit expansion

- Operating leverage
- Aftermarket mix
- Productivity



IV Disciplined, selective reinvestment

- Target Opex growth at less than half the rate of revenue growth
- Invest in priority areas: Technology, services, sales

I. We target accelerated revenue growth and market share gains in all markets

Markets and products	Expected growth vs. Kempower overall growth	Key growth drivers
Europe	Lower growth %	<ul style="list-style-type: none"> Increase share of wallet of large customers, continue to gain share outside of Nordics
North America	Higher growth %	<ul style="list-style-type: none"> New customer acquisition, and scaling with customer won over the last two years
APAC	Higher growth %	<ul style="list-style-type: none"> Currently low market share offers upside especially through new customer acquisition
Aftermarket	Highest growth %	<ul style="list-style-type: none"> Commercializing services and software offerings to large installed base
Total	15-25%¹	Above market growth across regions



1) CAGR in 2025-30

I. Our growth plans are supported by market growth fueled by customer funding

Over the past 2 years, CPOs and fleet operators have raised around EUR 10 bn of capital in Europe and North America alone

North America
Approx.
5
EUR bn

Europe
Approx.
5
EUR bn

WHY THIS MATTERS

Significant private financing for customers across regions and continents for DC fast charging expansion

Kempower already engaged with the leading well invested players with ample opportunity to deepen wallet share and accelerate growth

II. Lifecycle solutions: Building and scaling a recurring revenue business

Four levers of lifecycle value capture



Parts Capture
PROPRIETARY IP, MARGIN-RICH



Service Contracts
PREDICTABLE, MULTI-YEAR



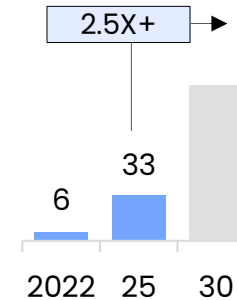
Modernization & Upgrades
PROJECT-BASED, FAST ROI



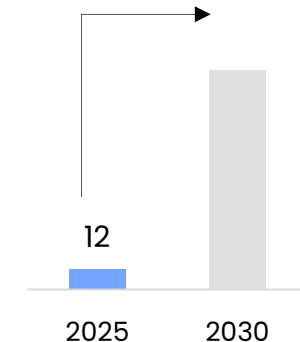
Software
SUBSCRIPTION, RECURRING

Significant opportunity driven by install base growth

Installed charging points
in '000 units



Aftermarket & services
revenue €M



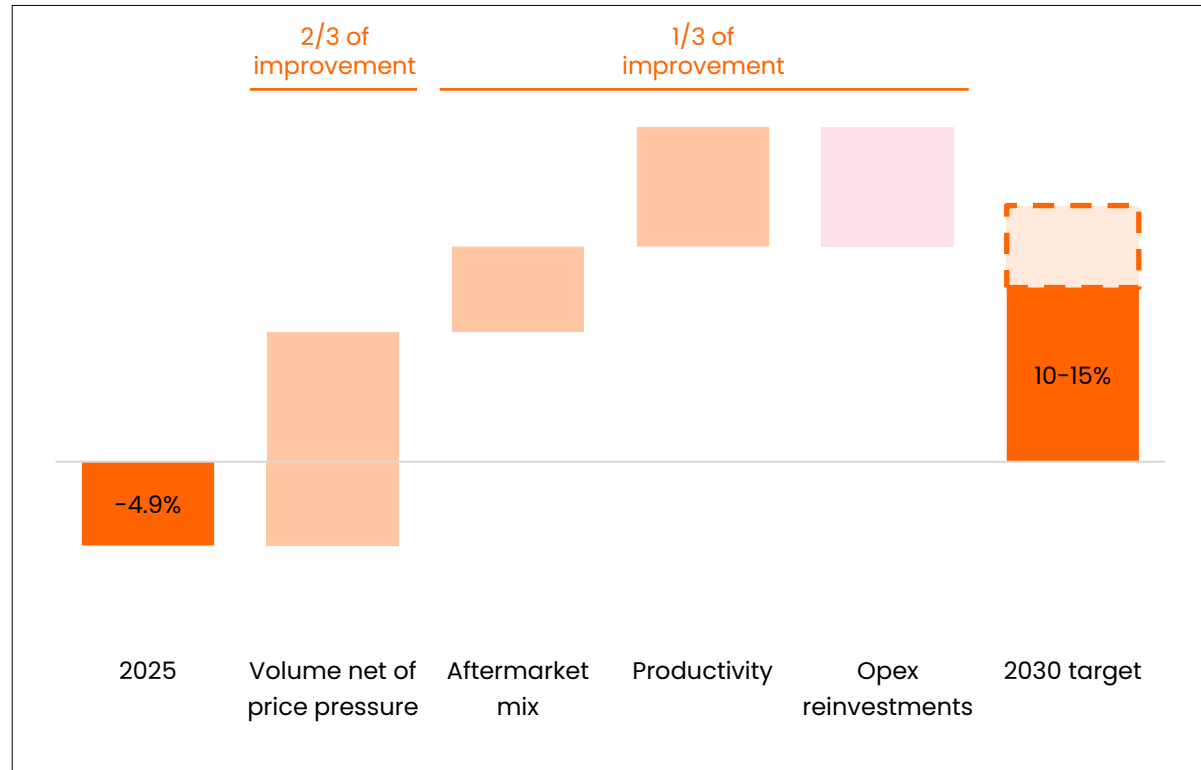
Data & Analytics is our strategic advantage

Every installed unit and charging session feeds our data platform - compounding advantages in uptime prediction, energy optimization, and customer intelligence

Aftermarket & software shift to materially higher share of revenue - higher margin, better predictability with recurring base

III. We target profitability improvement through revenue growth, aftermarket sales contribution and productivity

Operative EBIT margin bridge 2025-30 (indicative)



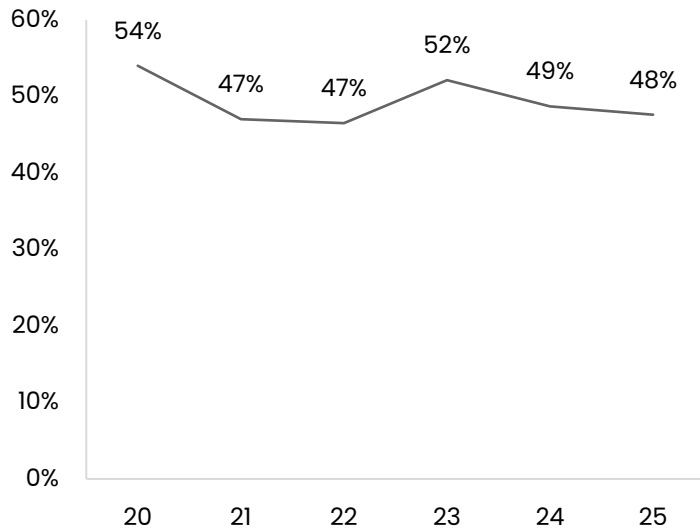
Indicative directional ranges, not formal financial guidance. Actual progression subject to market conditions, currency, customer demand and timing of investments.

Key profitability drivers

- Volume net of price pressure**
 - Hardware revenue growth drives profitability improvement despite price erosion in the market
- Aftermarket mix**
 - Services and software business growth supporting profitability through sales mix
- Productivity**
 - Productivity improvement through unit-cost savings program (targeting EUR 10+m savings in 2026)
- Opex reinvestments**
 - Incremental opex investments into technology, services and go-to-market to accelerate growth

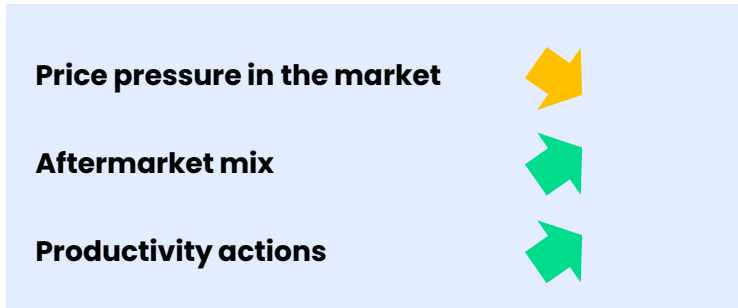
III. Productivity improvement: Unit cost reduction program defending gross margin

Gross margin 2020-25 (%)



Gross margin has been mid to high forties

Key drivers in defending gross margin



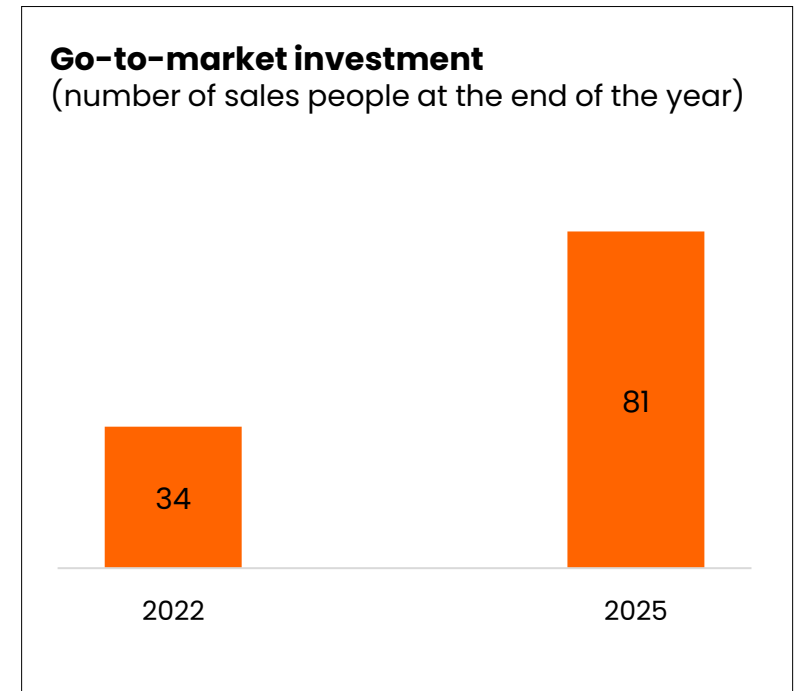
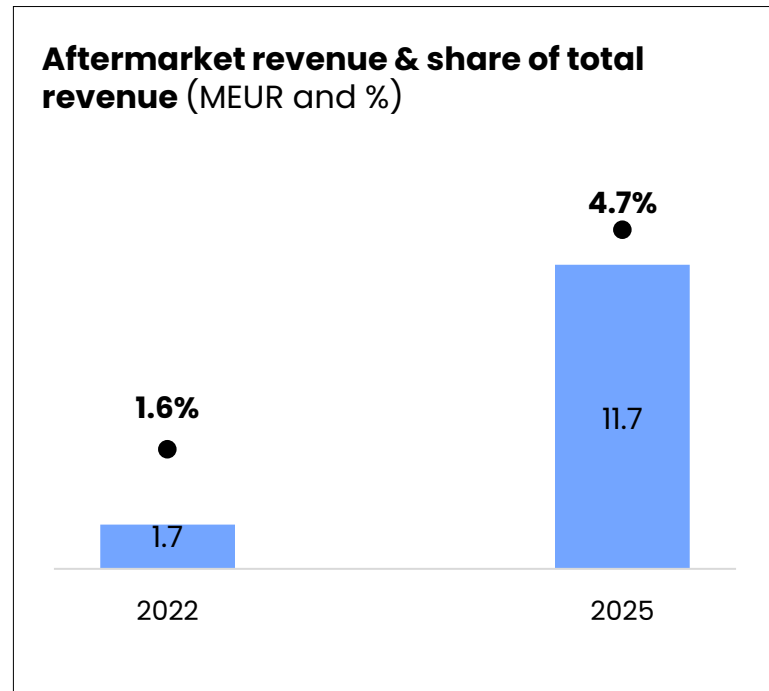
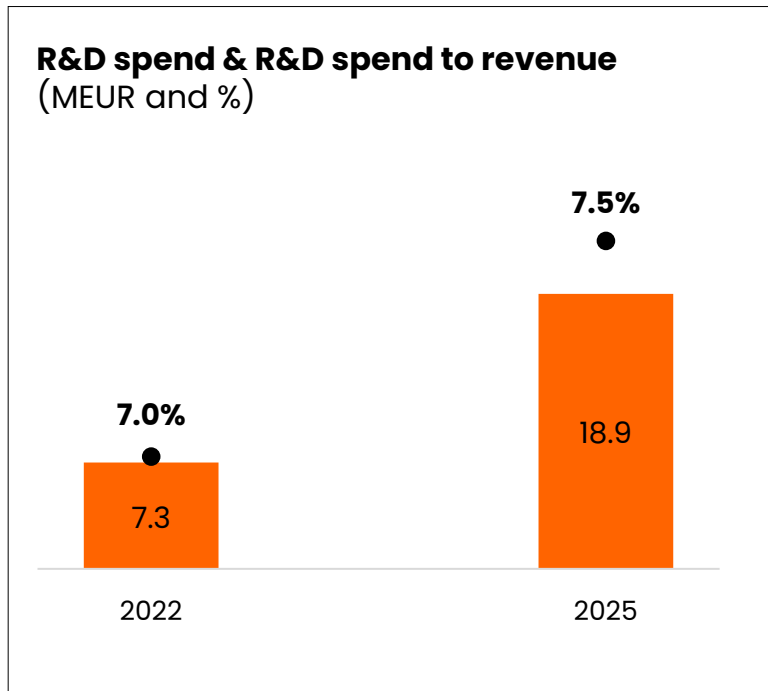
Gross margin is impacted by price pressure, aftermarket mix and productivity

Unit cost reduction program

- Initiated in H2 25 to mitigate sales price pressure through supply chain and operational improvements
- EUR 10+ million productivity improvement target in 2026

Cost and productivity improvement from operations, sourcing and procurement

IV. Re-investment in technology differentiation, growth and profitability



We can drive growth and profitability improvement with limited needs for investments in R&D, services and go-to-market

Updated financial targets: We target sustained profitable growth

**FINANCIAL TARGETS
CAPITAL MARKETS DAY 2026**

<p>REVENUE GROWTH</p> <p>15-25%</p> <p>CAGR by 2030</p>	<p>OPERATIVE EBIT</p> <p>10-15%</p> <p>Target by 2030</p>	<p>DIVIDENDS</p> <p>No dividends in the short term</p>
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How the range works across market scenarios

	Slow market	Base market	Accelerated
Market state			
Kempower revenue growth	Lower end of target range	Mid-point of target range	Upper end of target range
Reinvestment	Tighter	Balanced	Lean-in
Operative EBIT expansion	Sustained profitable growth		



Capital
Markets
Day

May 26, 2026

Kempower 2.0: Scaling a global leader in DC fast charging

Bhasker Kaushal
Chief Executive Officer

Executive summary:

Kempower 2.0: Proven leader. Scaling platform. Built to compound

Mission **Accelerating the electric mobility transition**

Vision **A top 3 global leader in DC fast charging - trusted by customers, built to compound**



Attractive, fast-growing market

✓ Sustained growth in addressable market driven by growing EV adoption across regions and segments

€4.5B → €10+B

Total addressable market, 2025 → 2030



Proven leadership position

✓ Leader in distributed architecture, with industry's strongest combination of hardware, services and software

Top 3

Global position ambition¹, by 2030



Expanding to full lifecycle solutions

✓ Evolving from one-time hardware sales to full lifecycle offering with recurring aftermarket revenues

15-25%

Revenue CAGR target, 2025-2030



Sustained profitable growth

✓ Consistent above-market revenue growth and profitability through market cycles

10-15%

EBIT margin target, by 2030

1) Ambition in our addressable markets



Capital
Markets
Day

May 26, 2026

Thank you for joining!

Glossary: Key terms used today

Charging technology, vehicles, customers & operations

DC fast charging – Direct-current charging >50 kW, typically <30 min to 80%

AC charging – Alternating-current charging <22 kW, 8+ hour charging time

MCS – Megawatt Charging System – >1 MW DC for heavy-duty trucks

CCS – Combined Charging System – DC fast-charging connector standard

NACS – North American Charging Standard connector

kW / kWh / kVA – Power (kW), energy (kWh) and apparent power (kVA) units

BESS – Battery Energy Storage System co-located with chargers

EMS – Energy Management System optimizing grid, storage and load

DC microgrid – Localized DC distribution: chargers, storage, renewables

Power Unit / Satellite – Distributed architecture – central power feeding remote dispensers

Dynamic Power Sharing – Real-time allocation of available power across vehicles

SiC – Silicon Carbide – wide-bandgap semiconductor for power electronics

DC-DC architecture (in BEV DC fast charging): A system that converts high-voltage DC from a charging station into the voltage required by the vehicle's battery, bypassing the onboard charger to minimize conversion losses and deliver power directly to the battery.

EV / BEV – Electric Vehicle / Battery Electric Vehicle

ICE – Internal Combustion Engine vehicle

HGV – Heavy Goods Vehicle (commercial truck)

CPO – Charging Point Operator – operates public networks

Fleet – Captive vehicles of one owner (bus, truck, LCV depots)

Public charging – Charging open to public (passenger + truck)

Off-highway – Non-road segments: ports, mining, construction

ChargEye – Kempower's AI-led cloud platform (Service, Energy, Operations)

Predictive Maintenance – AI-driven servicing triggered by system-health signals

Uptime / SoH – Charger availability %; battery State of Health vs. original capacity

Financial & strategy

TAM – Total Addressable Market

CAGR – Compound Annual Growth Rate

TCO – Total Cost of Ownership – lifetime hardware, software, energy, service

SaaS – Software-as-a-Service – recurring subscription model

Regulation, geography & quality

APAC / EMEA – Asia-Pacific; Europe, Middle East & Africa regions

DACH / Benelux – Germany-Austria-Switzerland; Belgium-Netherlands-Luxembourg

NEVI – US National EV Infrastructure funding program

AFIR – EU Alternative Fuels Infrastructure Regulation

BABA – Build America, Buy America – US procurement preference rules

EU Taxonomy / CSRD – EU sustainability classification; corporate ESG reporting directive

CE / UL – EU compliance marking; US/Canada safety certification

ISO 9001 / 14001 / 27001 / 45001 – Quality / Environment / Infosec / OHS standards

EcoVadis – Independent sustainability ratings (Gold = top tier)

LTIF / TRIR / eNPS – Lost-time injury frequency; recordable incident rate; employee NPS

Scope 2 / Scope 3 – Indirect GHG emissions: purchased energy; value chain

IPR – Intellectual Property Rights – patents, trademarks, know-how